National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

May 2020

Payroll Personnel Output (PPO)

PUBLICATION CATEGORY
Reporting

PROCEDURE MANUAL
Payroll Personnel Output (PPO)

Table of Contents

Latest Update Information

The following changes have been made to the Payroll Personnel Output (PPO) procedure:

Section	Description of Change
Your Personal Benefits Statement	Replaced the 2018 Personal Benefits Statement with the 2019 Personal Benefits Statement. Added Federal Deposit Insurance Corporation (FDIC) employees in Pay Plan **EX** to the list of employees who will not receive a personal benefits statement. Updated the Thrift Saving Program (TSP) Annuity Interest Rate Index to **1.750%**.

Overview

The Payroll/Personnel Output (PPO) procedure lists, illustrates, and describes external payroll/personnel reports and forms. The reports and forms are generated by the National Finance Center's (NFC) Payroll/Personnel System (PPS) on a recurring or as-requested basis. These reports are produced from information stored in the PPS database, which stores current and historical employee data relating to pay, leave, employment status, organizational structure, position, etc. This information is used in personnel management and statistical analysis and serves as a daily aid in personnel operations.

This procedure contains an example of each report accompanied by a brief description of its contents, significant characteristics, and additional ways to to obtain the report (if applicable).

PREPARED XX/XX/XX AECO3901 ANNUAL LEAVE STATUS REPORT PAGE 1
OF LEAVE TO BE TAKEN, FORFEITED, OR RESTORED – AS OF XX/XX/XX

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AG 96 90 OFFICE OF FINANCE AND MANAGEMENT CONTACT POINT 90 11 1000 10 10

SOCIAL SECURITY NUMBER	EMPLOYEE NAME	ANNUAL CEILING	LEAVE CURRENT BALANCE	PROJECTED ACCRUAL	HOURS TAKE FORFEIT OR RESTORE	DATE LEAVE CATEGORY CHANGES	PAY PERIOD CATEGORY CHANGES
XXX-XX-XXXX	DOE, JANE R.	240.00	271.75	323.75	83.75		
XXX-XX-XXXX	DOE, JOHN A.	240.00	249.50	313.50	73.50		
	CONTACT POINT TOTAL 2						

ANNUAL LEAVE CAN ONLY BE RESTORED DUE TO AN ADMINISTRAT VE ERROR SICKNESS OR EXIGENCIES OF THE PUBLIC BUSINESS FOR SUCH LEAVE TO BE RESTORED, IT MUST BE SCHEDULED IN WRITING THREE PAY PERIODS PRIOR TO THE END OF THE LEAVE YEAR. FORM AD–582, AUTHORIZATION FOR RESTORED ANNUAL LEAVE, MUST BE SENT TO NFC TO ESTABLISH THE NUMBER OF HOURS OF RESTORED LEAVE.

Figure 1: Example of a PPO Report

To formulate the payroll/personnel reports, information is collected from numerous payroll/personnel forms for employees who are payrolled by NFC. Agencies enter employee data into PPS through Payroll/Personnel entry systems. Data is also obtained from other areas of the PPS database.

Note: Most reports are distributed via Personnel Office Identifier (POI); however, on some reports, the Agency is designated by Submitting Office Number (SON). Please be aware that POI and SON are the same for each Agency.

Payroll/Personnel Processing Flow

The flowchart below illustrates NFC's applications and systems and how they interact.

HRLOB Solutions Flowchart

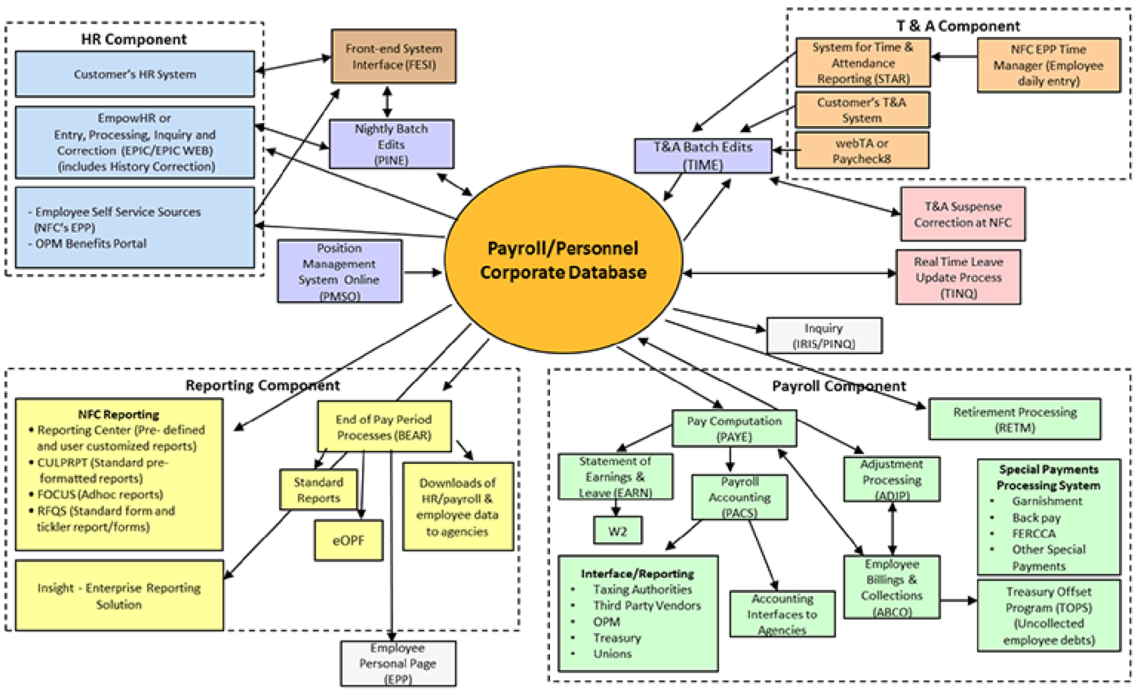


Figure 2: Payroll/Personnel Processing Flowchart

Payroll/Personnel Systems and Applications

EmpowHR. EmpowHR is a Human Capital Management System comprised of an integrated suite of commercial and Government applications that support all critical Human Resources (HR) components in a single enterprise system.

Front-End System Interface (FESI). FESI is used to provide an interface for processing payroll/personnel and position data through batch transmissions between an Agency's front-end entry system and NFC's PPS.

Information/Research Inquiry System (IRIS). IRIS is a menu-driven system used for inquiry access to an employee's current and historical payroll/personnel data. The data is the result of transactions processed in PPS.

Insight. Insight is an enterprise-wide data warehouse and reporting solution with advanced reporting and business intelligence capabilities. It integrates multiple data sources into one tool to provide comprehensive reporting through a library of standard reports and ad-hoc reporting functionality. The dashboard allows you to manipulate data reports, in an easy, time-efficient manner, enabling the development of innovative business insights.

Paycheck8. Paycheck8 is a Web-based T&A application specially designed to meet the T&A reporting requirements for Federal Departments or Agencies and their employees. This application permits T&A information to be entered, verified, electronically certified, and submitted for processing to NFC.

Payroll/Personnel Inquiry System (PINQ). PINQ is used as a tool for researching payroll-related inquiries received from employees and other sources. PINQ provides immediate access to at least 25 pay periods of current payroll data. Data entered, transmitted, and received through NFC's and Agencies' T&A systems are displayed in PINQ after it passes the TIME edits.

Payroll/Personnel Report Generator System (CULPRPT). CULPRPT is an online reporting system used to generate formatted payroll and personnel-related reports. CULPRPT reports are used to alert Agency staff of missing T&As or personnel documents, discrepancies in leave balances, and failure of TIME edits.

Personnel Input and Edit System (PINE). PINE edits and audits all payroll/personnel documents. It builds a suspense file for correcting current and future actions. Documents are released from PINE to the Personnel Processing System (PEPL). Once the data is released to PEPL, it is retrieved during the pay period and the information is displayed in IRIS.

Personnel Processing System (PEPL). PEPL performs the update function of the personnel areas of the database. All documents passing validation through PINE are processed through PEPL for necessary update or modification of database elements. PEPL applies the processed personnel transactions to the database. The data is retrieved during the pay period from PEPL and displayed in IRIS. PEPL also produces a log of all transactions applied to the database, as well as utilization statistics and management reports.

Position Management System Online (PMSO). PMSO database contains position data. Agencies enter position data in PMSO. This data is linked internally with employee data during the processing of PINE. IRIS reflects the data as processed through PINE and released to PEPL.

Remote Forms Queuing System (RFQS). RFQS is a computerized batch-processing system that uses information in PPS to provide Agency personnel offices with electronic control in obtaining forms and tickler reports at remote sites.

Reporting Center (RPCT). RPCT is a Web-based reporting tool that provides a secure and valid method of obtaining sensitive and nonsensitive information in an electronic environment.

Retirement System (RETM). RETM is used to track the processing of retirement and applications for retirement benefits in the event of an employee's (1) retirement, (2) disability retirement, (3) separation, or (4) death. Applications and retirement records are tracked from submission until certified correct. After the certification process is complete, the records and applications are released and forwarded to the Office of Personnel Management (OPM).

System for Time and Attendance Reporting (STAR). STAR is a Web-based application used to prepare T&A data and create a transmission file to be sent electronically to NFC.

Time and Attendance Validation System (TIME). TIME reads, collects, edits, audits, and validates Time and Attendance (T&A) data transmitted to NFC for all employees paid by NFC. Additionally, TIME updates the payroll/personnel database, thereby establishing the hours and type of pay for which the employee is paid. IRIS displays T&A data during the pay period after the T&A releases from TIME.

Web-based Entry, Processing, Inquiry, and Correction System (EPIC Web). EPIC Web is used to enter payroll/personnel transactions, correct transactions that have failed the database edits, execute status and suspense reports, delete and restore transactions, and view future and current payroll/personnel transactions to be processed.

webTA. webTA is a Web-based application specifically designed to support the Federal workforce time and attendance process and provides employees with an online, easy-to-use process with numerous capabilities for efficiently managing timekeeping tasks.

Request for a Change to a Report Distribution

Agencies are required to inform NFC of any changes to:

- Organizational breakout needs (i.e., levels of reporting required)
- Destination needs (i.e., distribution list)
- Output type needs (e.g., hard copy, electronic transmission)
- Required number of copies

To add, change, or delete a report or the distribution information for a report, complete Form AD-1083, Request for Action for Reports, and return it by email to *Client.Management@nfc.usda.gov*.

The Government Employees Services Division's (GESD) Client Management Branch (CMB) will coordinate requests to ensure your address information is routed to the NFC organization responsible for updating.

Form AD-1083 can be used to update addresses for Agency offices that are receiving any reports from NFC. Form AD-1083 consolidates the information needed for any address change. Completion instructions for Form AD-1083 are also available on NFC’s Web site.

Please follow these instructions to ensure proper completion of the form. Also, when changing/deleting an address, it is important to identify any number or acronym that appears on the current mailing label. This information will help NFC's Scheduling section to pinpoint address sources and ensure accurate updates.

This form can be found on the NFC Web site. To locate this form, select ***HR and Payroll Clients*** (see HR and Payroll Clients page - ***https://nfc.usda.gov/ClientServices/HR_Payroll/index.php***) from the MyNFC drop-down menu on the NFC homepage. At the HR and Payroll Clients page, select the ***Publications*** tab and from there select ***AD Forms*** from the Forms Library menu. The AD Forms are listed in numerical order.

REQUEST FOR ACTION FOR REPORTS
(For adding, changing, or deleting addresses for distribution of reports)

A. IDENTIFICATION *(Complete this section for all requests)*

EMAIL TO: **Client.Management@nfc.usda.gov**

1. CONTACT NAME *(Name of person completing this form)*
2. CONTACT TELEPHONE NUMBER *(Area code and number)*

B. REPORTS ACTION *(Check appropriate block(s))*

Order report(s) *(Complete Sections A, B, C, & D)*	**Change level(s) or distribution control** *(See Block 9) (Complete Sections A, B, C, & D)*
Change an address for reports *(Complete Sections A, B, C, & D)*	**Discontinue report(s)** *(Complete Sections A, B, C, & D)*
Change report media *(See Block 8) (Complete Sections A, B, C, & D)*	**Change number of copies of reports** *(See Block 8) (Complete Sections A, B, C, & D)*

ORDERING REPORTS

3. MAILDROP NUMBER *(First number on banner page)*
4. BUNDLE ID *(Second number on banner page)*
5. REPORT/JOB SET NUMBER
6. REPORT TITLE
7. DISTRIBUTION CONTROL

8. MEDIA *(Check one or more and indicate the number of copies)*: NFC PRODUCED HARDCOPY; # OF COPIES; ELECTRONIC TRANSMISSION; NODE ___ ___ ___ ___ /REMOTE DESTINATION *(or printer ID)*

9. REPORTING LEVELS *(Check one or more)*: DEPARTMENT; AGENCY; POI; CONTACT POINT; 2ND LEVEL ORG; 3RD LEVEL ORG; 4TH LEVEL ORG

C. ADDRESS DATA *(Complete this section for all requests)*

10. ADDRESS KEY CODE *(As shown on the mailing label)*

CURRENT OR OLD ADDRESS	NEW ADDRESS
11. NAME	11. NAME
12. AGENCY NAME / 13. AGENCY CODE	12. AGENCY NAME / 13. AGENCY CODE
14. AGENCY STREET ADDRESS	14. AGENCY STREET ADDRESS
15. CITY / 16. STATE / 17. ZIP+4	15. CITY / 16. STATE / 17. ZIP+4
18. AGENCY TELEPHONE NUMBER *(Area code and number)* / 19. EMAIL ADDRESS	18. AGENCY TELEPHONE NUMBER *(Area code and number)* / 19 EMAIL ADDRESS

D. AUTHORIZATION *(Complete this section for all requests)*

20. AUTHORIZED SIGNATURE AND TITLE
21. TELEPHONE NUMBER *(Area code and number)*
32. DATE

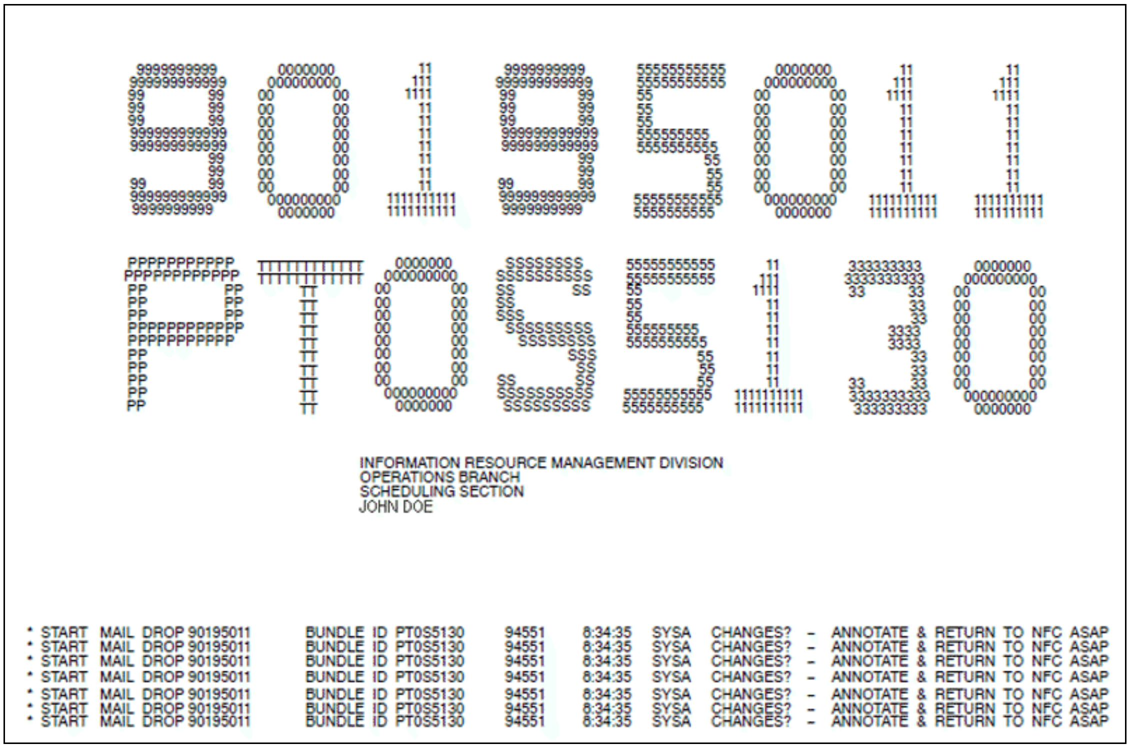
FORM AD-1083 (Revised 6/17)

Figure 3: Form AD-1083, Request for Action for Reports

Each system-generated report has a banner cover sheet. It displays the address, mail drop number, and bundle identification (ID). When submitting any of the requests, you must reference the following items:

- Mail Drop Number - printed on the banner cover sheet (i.e., 90195011).
- Bundle ID - printed on the banner cover sheet (i.e., PT0S5130).

Note: If the identification information for various report requests is the same, you only have to complete one Form AD-1083 and include a list of the mail drop numbers and bundle IDs for each report.


90195011

PT0S5130

INFORMATION RESOURCE MANAGEMENT DIVISION
OPERATIONS BRANCH
SCHEDULING SECTION
JOHN DOE

* START MAIL DROP 90195011 BUNDLE ID PT0S5130 94551 8:34:35 SYSA CHANGES? - ANNOTATE & RETURN TO NFC ASAP
* START MAIL DROP 90195011 BUNDLE ID PT0S5130 94551 8:34:35 SYSA CHANGES? - ANNOTATE & RETURN TO NFC ASAP
* START MAIL DROP 90195011 BUNDLE ID PT0S5130 94551 8:34:35 SYSA CHANGES? - ANNOTATE & RETURN TO NFC ASAP
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* START MAIL DROP 90195011 BUNDLE ID PT0S5130 94551 8:34:35 SYSA CHANGES? - ANNOTATE & RETURN TO NFC ASAP

Figure 4: Report Cover Banner Sheet

Equal Employment Opportunity Information

Equal Employment Opportunity (EEO) program directors have the ultimate responsibility for safeguarding and monitoring Agency minority employment data for their Agencies. They are also accountable for ensuring that Agency officials, with authorized access to this data for EEO purposes, are aware of the Privacy Act and security provisions. The data collected and displayed on the output reports is used for statistical reporting and does not identify individual employees by name or other means.

Who to Contact for Help

For questions about this procedure, contact the NFC Contact Center at **1-855-NFC-4GOV** (**1-855-632-4468**).

Payroll/Personnel Output Reports

The following is a list of the reports produced by NFC's PPS.

This section includes the following topics:

Annual Leave Status Report of Leave To Be Taken, Forfeited, or Restored

Report Number	AECO3901
Brief Description	Provides the projected number of annual leave hours an employee has in excess of the maximum carryover (usually 240 hours) to either use, lose, or have restored by the end of the leave year. This report contains sensitive data and its use is restricted. This report is produced annually (Pay Period (PP) 18) and is available as a hard copy or by electronic transmission. It is distributed by contact point number.

PREPARED XX/XX/XX AECO3901 ANNUAL LEAVE STATUS REPORT PAGE 1
OF LEAVE TO BE TAKEN, FORFEITED, OR RESTORED – AS OF XX/XX/XX

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AG 96 90 OFFICE OF FINANCE AND MANAGEMENT CONTACT POINT 90 11 1000 10 10

SOCIAL SECURITY NUMBER	EMPLOYEE NAME	ANNUAL CEILING	LEAVE CURRENT BALANCE	PROJECTED ACCRUAL	HOURS TAKE FORFEIT OR RESTORE	DATE LEAVE CATEGORY CHANGES	PAY PERIOD CATEGORY CHANGES
XXX-XX-XXXX	DOE, JANE R.	240.00	271.75	323.75	83.75		
XXX-XX-XXXX	DOE, JOHN A.	240.00	249.50	313.50	73.50		
	CONTACT POINT TOTAL 2						

ANNUAL LEAVE CAN ONLY BE RESTORED DUE TO AN ADMINISTRAT VE ERROR SICKNESS OR EXIGENCIES OF THE PUBLIC BUSINESS FOR SUCH LEAVE TO BE RESTORED, IT MUST BE SCHEDULED IN WRITING THREE PAY PERIODS PRIOR TO THE END OF THE LEAVE YEAR. FORM AD–582, AUTHORIZATION FOR RESTORED ANNUAL LEAVE, MUST BE SENT TO NFC TO ESTABLISH THE NUMBER OF HOURS OF RESTORED LEAVE.

Figure 5: Annual Leave Status Report of Leave To Be Taken, Forfeited, or Restored

Annual Report of Leave Usage for Leave Year 20XX

Report Number	PREP6102
Brief Description	Provides an annual summary of leave hours (e.g., number of days earned, number of days used, monetary value of leave used). This report is produced annually (leave year) and is available as a hard copy or by electronic transmission. It is distributed by Department, Agency, POI, and organizational structure to the 5th level.

RUN DATE XX/XX/XX PREP6102 ANNUAL REPORT OF LEAVE USAGE FOR LEAVE YEAR 20XX PAGE 001

DEPT CM U.S. DEPARTMENT OF COMMERCE LVLS 08 OFFICE OF PUBLIC AFFAIRS
AGCY 51 OFFICE OF THE SECRETARY LVLS 62 NEWS RELATIONS DIVISION

TYPE OF LEAVE	NO. OF EMPLOYEES	NO. DAYS EARNED	NO. DAYS USED	AVG. DAYS USED	VALUE OF LEAVE USED	NO. DAYS CARRIED OVER	NO. DAYS FORFEITED	LUMP SUM ANN LV PD NO. DAYS	VALUE	SICK LV DAYS RETIREMT CR
ANNUAL	2	5	2	1 0	$ 121	2				
SICK	2	5				4				
MILITARY**	0									
LWOP	0									
AWOL	0									
ADMINISTRATIVE	2		7	3 5	$ 680					

** FOR MILITARY LEAVE ONLY, THE REPORT COVERS THE FISCAL YEAR WHICH ENDED ON SEPTEMBER 30 OF THE LEAVE–YEAR

Figure 6: Annual Report of Leave Usage for Leave Year 20XX

Classified Employee Control Listing of Within-Grade Increase Forms for F/T and P/T Employees

Report Number	AECO36T7
Brief Description	Provides a list to the Agency of full-time (F/T) and part-time (P/T)

Report Number	AECO36T7
	employees for whom Form AD-658, Within-Grade Increase Record, is being distributed. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Classified Employee Control Listing of Within-Grade Increase Forms for F/T and P/T Employees.

```
PREPARED XX/XX/XX    AECO36T7        CLASSIFIED EMPLOYEE CONTROL LISTING OF                                PAGE    1
                          WITHIN-GRADE INCREASE FORMS FOR F/T AND P/T EMPLOYEES - AS OF XX/XX/XX

                                                              ** SENSITIVE PERSONNEL DATA - USE IS RESTRICTED **

  FW 06 U.S. OFFICE OF SPECIAL COUNSEL                          POI      4860      BELTSVILLE, MD
      EMPLOYEE NAME                 OFFICIAL TITLE OF POSITION          DUTY STATION LOCATION
           ORG.                           PAY               COMMENCING              PAY     NON-PAY  INTERMITTENT
           STRUCT. LEVELS      PAY         OCC   RATE INDIVIDUAL MASTER DATE TOWARD          PERIOD   STATUS    D A Y S
  SOC SEC NO -2-- THRU --8-  PLAN GRADE  SERIES DETR POS. NO   REC NO   WGI     D.S   CODES   WGI DUE  HOURS   WORKED ELAPSED
DOE, JANE P                             SOIL SCNTST                          BELTSVILLE, MD
XXX-XX-XXXX 0653052145846589   GS  11  2  0560   0  006T3685  6T3685  XX/XX/XX  24 0100 033   XX   20.00   000   0000
 DOE, JOHN                              PLANT PHYSIOL                        BELTSVILLE, MD
XXX-XX-XXXX 0650523587458548   GS  12  2  0438   0  001P8560  6P856   XX/XX/XX  24 0100 033   XX   20.00   000   0000
```

Figure 7: Classified Employee Control Listing of Within-Grade Increase Forms for F/T and P/T Employees

Classified Employee Within-Grade Increase Four Week Notification for F/T and P/T Employees

Report Number	AECO36U4
Brief Description	Provides a list to the Agency of F/T and P/T employees whose latest performance appraisal ratings are fully successful or greater. It is produced 4 weeks prior to the generation of Within-Grade Increases (WGI) for those employees listed on the report. It updates the 16 week notification previously issued. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Classified Employee Within-Grade Increase Four Week Notification for F/T and P/T Employees.

```
PREPARED XX/XX/XX     AECO36U4   CLASSIFIED EMPLOYEE WITHIN-GRADE INCREASE FOUR WEEK NOTIFICATION              PAGE     1
                                    FOR F/T AND P/T EMPLOYEES - AS OF XX/XX/XX

           A WITHIN GRADE INCREASE ACTION WILL BE PROCESSED FOR EACH LISTED EMPLOYEE WHOSE LATEST PERFORMANCE
                    RATING IS FULLY SUCCESSFUL OR GREATER. UNLESS ACTION IS TAKEN TO DENY THE INCREASE.

                                                              **  SENSITIVE  PERSONNEL  DATA  -  USE  IS  RESTRICTED  **

AG 03 03 AGRICULTURAL RESEARCH SERVICE                        POI     4860     BELTSVILLE, MD

       EMPLOYEE NAME                OFFICIAL TITLE OF POSITION                 DUTY STATION LOCATION
            ORG.                          PAY                   COMMENCING                 WGI       NON-PAY   INTERMITTENT
        STRUCT. LEVELS      PAY          OCC    RATE INDIVIDUALMASTER DATE TOWARD          PROCESSING STATUS     D A Y S
  SOC SEC NO -2-- THRU --8-  PLAN GRADE  SERIES DETRPOS  NO     REC NO     WGI       D S     CODES  PAY PERIOD  HOURS  WORKED ELAPSED

DOE, JANE A                         BUDG ANAL                                  BELTSVILLE, MD
XXX-XX-XXXX 0101010410000000   GS 11   2   0560    0  006T3685  6T3685   XX/XX/XX  24 0100 033        12                   000    0000

DOE, JOHN B                         PLANT PHYSIOL                              BELTSVILLE, MD
XXX-XX-XXXX 0101010405000000   GS 12   2   0438    0  006P8560  6P856    XX/XX/XX  24 0100 033        12                   000    0000

   STRUCTURE LEVEL 01 01 0104        TOTAL        2
```

Figure 8: Classified Employee Within-Grade Increase Four Week Notification for F/T and P/T Employees

Classified Employee Within-Grade Increase Sixteen Week Listing for F/T and P/T Employees

Report Number	AECO36S1
Brief Description	Provides a list of of classified F/T and P/T employees whose latest performance appraisal rating is fully successful or greater. A WGI will be generated by PPS for each of these employees. This report is produced 16 weeks prior to the due date of the employee's WGI. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. This report is also available through RFQS, Classified Employee Within-Grade Increase Sixteen Week Listing for F/T and P/T Employees.

```
  PREPARED XX/XX/XX     AECO36S1    CLASSIFIED EMPLOYEE WITHIN-GRADE INCREASE SIXTEEN WEEK LISTING               PAGE 1
                                         FOR F/T AND P/T EMPLOYEES - AS OF XX/XX/XX

       A WITHIN-GRADE INCREASE ACTION WILL BE PROCESSED FOR EACH LISTED EMPLOYEE WHOSE LATEST PERFORMANCE
                RATING IS FULLY SUCCESSFUL OR GREATER, UNLESS ACTION IS TAKEN TO DENY THE INCREASE.

                                                              **  SENSITIVE  PERSONNEL  DATA  -  USE  IS  RESTRICTED  **

    AG 03 03 AGRICULTURAL RESEARCH SERVICE                          POI     4860     BELTSVILLE, MD

        EMPLOYEE NAME                OFFICIAL TITLE OF POSITION                  DUTY STATION LOCATION
             ORG.                          PAY                    COMMENCING                 WGI      NON-PAY  INTERMITTENT
         STRUCT. LEVELS       PAY          OCC   RATE INDIVIDUAL MASTER DATE TOWARD           PROCESSING STATUS     D A Y S
   SOC SEC NO -2-- THRU --8-  PLAN  GRADE  SERIES DETR POS. NO      REC NO.   WGI      D S     CODES PAY PERIOD  HOURS  WORKED ELAPSE

  DOE, JANE L                         BUDG ANAL                                  BELTSVILLE, MD
  XXX-XX-XXXX  0101052145846589    GS  11   2    0560    0     006T3685    6T3685    XX/XX/XX   24 0100 033       XX        20 00    000    0000

  DOE, JOHN A                         PLANT PHYSIOL                              BELTSVILLE, MD
  XXX-XX-XXXX  0101052145846589    GS  12   2   0438     0     006P856     6P856     XX/XX/XX   24 0100 033       XX        20 00    000    0000
```

Figure 9: Classified Employee Within-Grade Increase Sixteen Week Listing for F/T and P/T Employees

Classified Employee WGI Status Sixteen Week Listing for F/T and P/T Employees

Report Number	AECO36S2
Brief Description	Provides a list of classified F/T and P/T employees whose latest performance appraisal is less than satisfactory. A WGI will not be processed for these employees. The report is produced 16 weeks prior to the due date of the employee's WGI. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Classified Employee WGI Status Sixteen Week Listing for F/T and P/T Employees.

```
 PREPARED XX/XX/XX      AECO36S2      CLASSIFIED EMPLOYEE WGI STATUS SIXTEEN WEEK LISTING                 PAGE     1
                                            FOR F/T AND P/T EMPLOYEES - AS OF XX/XX/XX

        A WITHIN GRADE INCREASE ACTION WILL NOT BE PROCESSED FOR THESE EMPLOYEES -  DUE TO LESS THAN SATISFACTORY PERFORMANCE
              TO GRANT AN EMPLOYEE A WITHIN GRADE INCREASE THE AGENCY MUST CHANGE THE PERFORMANCE APPRAISAL

                                                                     **  SENSITIVE  PERSONNEL  DATA  -  USE  IS  RESTRICTED  **

 AG 03 03 AGRICULTURAL RESEARCH SERVICE                                 POI      4860    BELTSVILLE, MD

      EMPLOYEE NAME                     OFFICIAL TITLE OF POSITION                     DUTY STATION LOCATION
           ORG.                                  PAY                   COMMENCING                 PROJECTED  NON-PAY INTERMITTENT
         STRUCT. LEVELS      PAY        OCC     RATE INDIVIDUAL MASTER DATE TOWARD              PAY PERIOD  STATUS     D A Y S
 SOC SEC NO -2-- THRU --8-   PLANGRADE  SERIES DETR POS. NO    REC NO    WGI      D S    CODES    WGI DUE    HOURS  WORKED ELAPSED

DOE, JANE R                             COMPR PROGMR                               BELTSVILLE, MD
XXX-XX-XXXX 1019152145846589  GS  11  2   0560     0  006T3685   6N3685  XX/XX/XX  24 0100 033      XX       20 00    000    0000

DOE, JOHN  A                            RES ENT                                    BELTSVILLE, MD
XXX-XX-XXXX 1019152145846589  GS  12  2   0438     0  006P856    1A7856  XX/XX/XX  24 0100 033      XX       20 00    000    0000

             EMPLOYING OFFICE TOTAL          1
```

Figure 10: Classified Employee WGI Status Sixteen Week Listing for F/T and P/T Employees

Compensatory Time for Religious Observance

Report Number	PAYE6102
Brief Description	Provides a list of employees who were advanced or earned compensatory time for religious observance. It also provides the pay period in which the compensatory time was incurred and the number of hours that have been paid back to date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI.

DATE XX/XX/XX PAYE6102 FOREST SERVICE SOUTHERN REGION #REGION 8# PAGE 1
DEP REG FORESTER FOR ADMIN – FISCAL AND LAW ENFORCEMENT
AG 11 SUBMITTING OFF. : 5153 ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED ** PAY PERIOD X
COMPENSATORY TIME FOR RELIGIOUS OBSERVANCE

EMPLOYEE NAME	S. S. NO.	PAY PER./ YEAR	REL. COMP. TIME (ADVANCED)	REG. /REL. COMP TIME (EARNED)	REG. COMP. TIME (USED)	REL. COMP. TIME (BALANCE)	CURRENT REL. COMP TIME BALANCE	STA
DOE, JOHN A	XXX-XX-XXXX	07/93	21.25	4.00		21.25–	21.25–	
		09/93		4.00		21.25–		
		18/93		9.75	1.25	21.25–		
		05/94			15.75	21.25–		

Figure 11: Compensatory Time for Religious Observance

Control List for Supervisory/Managerial Probationary Period Report Forms

Report Number	AECO36T3
Brief Description	Provides notification that Form AD-773, Supervisory or Managerial Probationary Period Report, has been distributed for each employee listed signifying approaching expiration of supervisory/managerial probationary period. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Control List for Supervisory/Managerial Probationary Period Report Forms.

PREPARED XX/XX/XX AECO36T3 CONTROL LIST FOR SUPERVISORY/MANAGERIAL PAGE 1
PROBATIONARY PERIOD REPORT FORMS – AS OF XX/XX/XX
** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **
AG 05 05 AGRI STABILIZATION & CONSERV SER POI XXXX WASHINGTON, DC

EMPLOYEE NAME	S S NUMBER	D U T Y S T A T I O N	L O C A T I O N	ORG. STRUCTURE CODES 2 3 4 5 6 7 8	R E M A R K
DOE, JOHN A	XXX-XX-XXXX	ANYTOWN, LA	06–1001–001	02 13 0010 01 00 00 00	
	EMPLOYING OFFICE TOTALS 1				

Figure 12: Control List for Supervisory/Managerial Probationary Pay Period Report Forms

Control Listing of Performance Evaluation Forms Prepared for F/T and P/T Employees

Report Number	AECO36T8

Report Number	AECO36T8
Brief Description	Provides notification that Form AD-435, Performance Appraisal, has been distributed for each F/T and P/T employee listed. It is prepared five pay periods prior to the evaluation due date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Control Listing of Performance Evaluation Forms Prepared for F/T and P/T Employees.

```
 PREPARED XX/XX/XX                    CONTROL LISTING OF PERFORMANCE EVALUATION                   PAGE    1
                                FORMS PREPARED FOR F/T AND P/T EMPLOYEES – AS OF XX/XX/XX

                                                       **  SENSITIVE  PERSONNEL  DATA  –  USE  IS  RESTRICTED  **
 KG 82 82 ACTION                                                       4860   BELTSVILLE, MD

       EMPLOYEE NAME                 OFFICIAL TITLE OF POSITION                DUTY STATION LOCATION
              ORG.                               PAY
            STRUCT. LEVELS      PAY       OCC    RATE INDIVIDUAL  MASTER                           PERFORMANCE EVALUATION
 SOC SEC NO –2–– THRU ––8–   PLANGRADE   SERIES  DETR POS NO      REC NO         D S    CODES   **FORMS DUE PAY PERIOD 14**

   DOE, JANE R                            COMPR PROGMR                          BELTSVILLE, MD
 XXX-XX-XXXX     100000000000   GM 14      0560     0    6N3685      1125          24 0100 033

   DOE, JOHN A                            RES ENT                               BELTSVILLE, MD
 XXX-XX-XXXX     000000000000   GM 13      0438     0    1A7856      2014          24 0100 033

     STRUCTURE LEVEL 00 0000    TOTAL       2
```

Figure 13: Control Listing of Performance Evaluation Forms Prepared for F/T and P/T Employees

Conversion to Career Tenure Four Week Notification

Report Number	AECO37U8
Brief Description	Provides notification to the Agency that an employee is approaching career tenure. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Conversion to Career Tenure Four Week Notification.

```
PREPARED  XX/XX/XX   AECO37U8   CONVERSION TO CAREER TENURE FOUR WEEK NOTIFICATION          PAGE 1
                                          AS OF XX/XX/XX
->->->->      AN 880/CHG IN TENURE ACTION WILL BE PROCESSED FOR EACH LISTED EMPLOYEE     <-<-<-<-
->->->->->      UNLESS ACTION IS TAKEN TO ALTER THE CAREER-PERMANENT-TENURE-START DATE   <-<-<-<-<-
AG 03 03 AGRICULTURAL RESEARCH SERVICE                          POI  4816  WASHINGTON, DC

   EMPLOYEE NAME              OFFICIAL TITLE OF POSITION        DUTY STATION LOCATION
        ORG.                                 PAY            CAREER               880        NON-PAY  INTERMITTENT
     STRUCT. LEVELS       PAY         OCC   RATE INDIVIDUAL MASTER PERM-TEN-ST   PROCESSING STATUS   DAYS
   SOC SEC NO -2- THRU -8- PLAN GRADE SERIES DETR POS. NO   REC NO DATE  D S CODES PAY PERIOD HOURS WORKED ELAPSED
DOE, JANE                     SECY TYPG                         WASHINGTON, DC
XXX-XX-XXXX 4013003010000     GS 06 3    0318  3           091267 XX/XX/XX 11 0010 00  13       000      0000

   STRUCTURE LEVEL XX XX XXXX           TOTAL 1
```

Figure 14: Conversion to Career Tenure Four Week Notification

Defacto Employment

Report Number	Defacto Employment
Brief Description	Provides a list of employees who have been paid for time worked during the pay period in which the not-to-exceed (NTE) date was reached. Agency personnel should review this list and submit the necessary documentation to NFC. All T&A reports received for subsequent pay periods are suspended and payments are withheld. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by contact point, Department, Agency, and organizational structure to the 2nd level.

```
   DATE: XX/XX/XX
SUBJECT: DEFACTO EMPLOYMENT              ** SENSITIVE PERSONNEL DATA - USE IS RESTRICTED **
     TO: 16-0020
          IN AN EFFORT NOT TO DELAY SALARY PAYMENTS, WE HAVE PAID THE FOLLOWING EMPLOYEES WHO HAVE
       EXCEEDED THEIR NTE DATES IN PAY PERIOD XX.

       NAME                   SSNO          CONTACT POINT      NTE DATE
         DOE         J        XXXXXXXXX     162929599199       XX/XX/XX

          PLEASE REVIEW YOUR RECORDS IMMEDIATELY AND SUBMIT NECESSARY DOCUMENTATION TO NFC. IF YOU
       HAVE ANY QUESTIONS REGARDING THIS NOTIFICATION, PLEASE CONTACT THE PAYROLL/PERSONNEL PROCESSING
       SECTION AT 504-680-4PAY (504-680-4729).

       PAYROLL/PERSONNEL PROCESSING SECTION
```

Figure 15: Defacto Employment

Detail in Support of 113-A

Report Number	EMPR3101

Report Number	EMPR3101
Brief Description	Provides a detailed list of the totals appearing on the Standard Form (SF) 113-A, Monthly Report of Federal Civilian Employment. The report identifies the Social Security number and surname for each employee included in the various line item totals on the SF 113-A. This report contains sensitive data and its use is restricted. This report is produced monthly and is available as a hard copy or by electronic transmission. It is prepared to lowest level of SF 113-A report distribution as requested by the Agency.

```
EMPR3101                                   DETAIL IN SUPPORT OF 113-A                          PAGE   4
DATE PREPARED:   XX/XX/XX
REPORT PERIOD:   XX/XX/XX  -  XX/XX/XX     DEPARTMENT:   DEPARTMENT OF COMMERCE
SENSEITIVE PERSONNEL DATA                       AGENCY:   DEPT OF COMMERCE PATIENT & TRADEMARK OFC
   USE IS RESTRICTED                                       ASST COMM FOR TRADEMARKS

                                           SA  00     4TH LEVEL  -  ORG STRUCTURE    00  33  00  0009
LINE   1          TOTALS         COLUMN  B        COLUMN  C        COLUMN  D        COLUMN  E
EMPLOYEES          155               0                0               155               0
  LINE  2      TOTAL  IN  PERMANENT POSITIONS
               SOCIAL  SECURITY NO                NAME               COLUMN CODE          PAY PLAN
                    XXX-XX-XXXX                   DOE                    E                   GS
                    XXX-XX-XXXX                   DOE                    E                   GS
                    XXX-XX-XXXX                   DOE                    E                   WS
```

Figure 16: Detail in Support of 113-A

Employees Approaching Expiration of Detail Assignment

Report Number	AECO37U1
Brief Description	Provides notification of employees who are approaching their NTE dates for detail assignments. It is generated three pay periods prior to the expiration date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Employees Approaching Expiration of Detail Assignment.

```
PREPARED XX/XX/XX   AECO37U1        EMPLOYEES APPROACHING EXPIRATION OF DETAIL ASSIGNMENT - AS OF XX/XX/XX        PAGE 1
                                                      **  SENSITIVE  PERSONNEL  DATA  -  USE  IS  RESTRICTED  **
AG 05 05     AGRI STABILIZATION & CONSERV SER                        PERS. OFF. ID.      4881     WASHINGTON, DC
             EMPLOYEE NAME
                   ORG. STRUCTURE       PAY         OCC      MASTER RCD  POSITION     DETAIL
SOC SEC NO    2   3     4     5      PLAN   GRADE  SERIES     NUMBER      NUMBER   EXPIRATION   OFFICIAL TITLE OF POSITION
DOE, JOHN A.
XXX-XX-XXXX   04  01 0002    00       GS      04     0318      888888    UNCL0035   XX/XX/XX     SECY TYPG
   STRUCTURE LEVEL    04 01 0002 00 TOTAL          1
             EMPLOYING OFFICE TOTAL           1
```

Figure 17: Employees Approaching Expiration of Detail Assignment

Employees Approaching Expiration of Grade Retention

Report Number	AECO37T9
Brief Description	Provides notification of employees approaching expiration of grade retention. It is generated three pay periods prior to the expiration date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Employees Approaching Expiration of Grade Retention.

```
PRRPARED  XX/XX/XX  AECO37T9   EMPLOYEES APPROACHING EXPIRATION OF GRADE RETENTION – AS OF – XX/XX/XX                PAGE     1
                                                                  ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **
   AG 03 03 AGRICULTURAL RESEARCH SERVICE                         POI     4860     BELTSVILLE, MD
              EMPLOYEE NAME                  INDIVIDUAL    *        CURRENT PAID GRADE DATA        *        GRADE RETENTION DATA
      SOCIAL           ORGANIZATIONAL         POSITION     *      OCCUPATION GRADE   SALARY        *     OCCUPATION  GRADE  EXPIRATION
     SECURITY        STRUCTURE CODES           NUMBER      * P/P  SER    FUNC /STEP  AMOUNT   RT PRD* P/P  SER    FUNC              DATE
 DOE, JANE
 XXX-XX-XXXX    10  12  1255  05  01  00  00   00885104    * WG 6907     00   06/05 000011.39  PH   A* WG 6907    00      05     XX/XX/XX
 DOE, JOHN A
 XXX-XX-XXXX    10  12  1255  05  01  00  00   008C2302    * WG 5703     00   06/05 000011.39  PH   A* WG 6907    00      05     XX/XX/XX

 DOE, JOHN B
 XXX-XX-XXXX    10  12  1260  10  05  05  00   008A5603    * WG 3603     00   10/05 000014.32  PH   A* WG 3603    00      08     XX/XX/XX

 DOE, JOHN C    10  12  1265  20  00  00  00   003B4489    * GS  1320    11   12/07 042989.00  PA   B* GS  1320   31      11     XX/XX/XX
 XXX-XX-XXXX
       STRUCTURE LEVEL 10 12          TOTAL          4
```

Figure 18: Employees Approaching Expiration of Grade Retention

Employees Approaching Expiration of Limited Appointment - Temporary

Report Number	AECO37T1
Brief Description	Provides notification of employees approaching expiration of their NTE date for temporary appointments. It is generated three pay periods prior to the expiration date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI.

```
PREPARED XX/XX/XXAECO37T1   EMPLOYEES APPROACHING EXPIRATION OF LIMITED APPOINTMENT – TEMPORARY – AS OF XX/XX/XX      PAGE    1
                                                               **  SENSITIVE  PERSONNEL  DATA  –  USE  IS  RESTRICTED  **
AG 03 03 AGRICULTURAL RESEARCH SERVICE                    POI        4860    BELTSVILLE, MD
          EMPLOYEE NAME
                  ORG.                                    SERVICE   NOT TO     A P P O I N T M E N T               L I M I T A T I O N
                STRUCTURE    PAY           OCC    TYPE    YEAR     EXCEED        MAXIMUM                EXPENDED              BALANCE
   SOC SEC NO   2   3    4   PLAN GRADE   SERIES  APPT    DATE      DATE     DOLLARS HRS  DAYS DOLLARS  HOURS DAYS DOLLARS HOURS DAYS
  DOE, JANE J
    XXX-XX-XXXX 10  12 1275     GS  11  01  0434     09   XX/XX/XX *XX/XX/XX
  DOE, JOHN R
    XXX-XX-XXXX 10  12 1275     GS  04  01  1131     09  *XX/XX/XX  XX/XX/XX        1040                 677 00                363 00
  DOE, JIM F
    XXX-XX-XXXX .0  12 1275     GS  04  01  0404     09  *XX/XX/XX  XX/XX/XX        1040                 467 00                522 00
       STRUCTURE LEVEL10  12  1275  TOTAL          3

     – SPLIT T&A REPORT REQUIRED WHEN SERVICE YEAR IS IN THE MIDDLE OF A PAY PERIOD –   * SPECIFIC LIMITATION BEING APPROACHED
```

Figure 19: Employees Approaching Expiration of Limited Appointment - Temporary

Employees Approaching Expiration of Temporary Promotion

Report Number	AECO37U2
Brief Description	Provides notification of employees approaching expiration of their NTE date for a temporary promotion. It is generated three pay periods prior to the expiration date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Employees Approaching Expiration of Temporary Promotion.

```
  PREPARED XX/XX/XX   AECO37U2          EMPLOYEES APPROACHING EXPIRATION OF TEMPORARY PROMOTION – AS OF XX/XX/XX      PAGE 1
                                                               **  SENSITIVE  PERSONNEL  DATA  –  USE  IS  RESTRICTED  **
 CM 51 55     INTERNATIONAL TRADE ADMINISTRATION                   PERS. OFF. ID.      1911     WASHINGTON, DC
           EMPLOYEE NAME                                                INDIVIDUAL
                ORG. STRUCTURE        PAY            OCC      MASTER RCD  POSITION  TEMP PROM
  SOC SEC NO    2   3      4    5     PLAN   GRADE  SERIES      NUMBER      NUMBER  EXPIRATION   OFFICIAL TITLE OF POSITION
 DOE, JOHN A
 XXX-XX-XXXX    41  040001    00       GS      12     1801       W95801   12345110  XX/XX/XX     IMPORT COMPLNC SPECLST
      STRUCTURE LEVEL   41 04 0001 00 TOTAL          1
                 EMPLOYING OFFICE TOTAL          1
```

Figure 20: Employees Approaching Expiration of Temporary Promotion

Employees with Dual Appointments

Report Number	BEAR7071
Brief Description	Provides a list of employees working under two different appointments. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

REPORT ID :BEAR7071 PAGE 1

EMPLOYEES WITH DUAL APPOINTMENTS

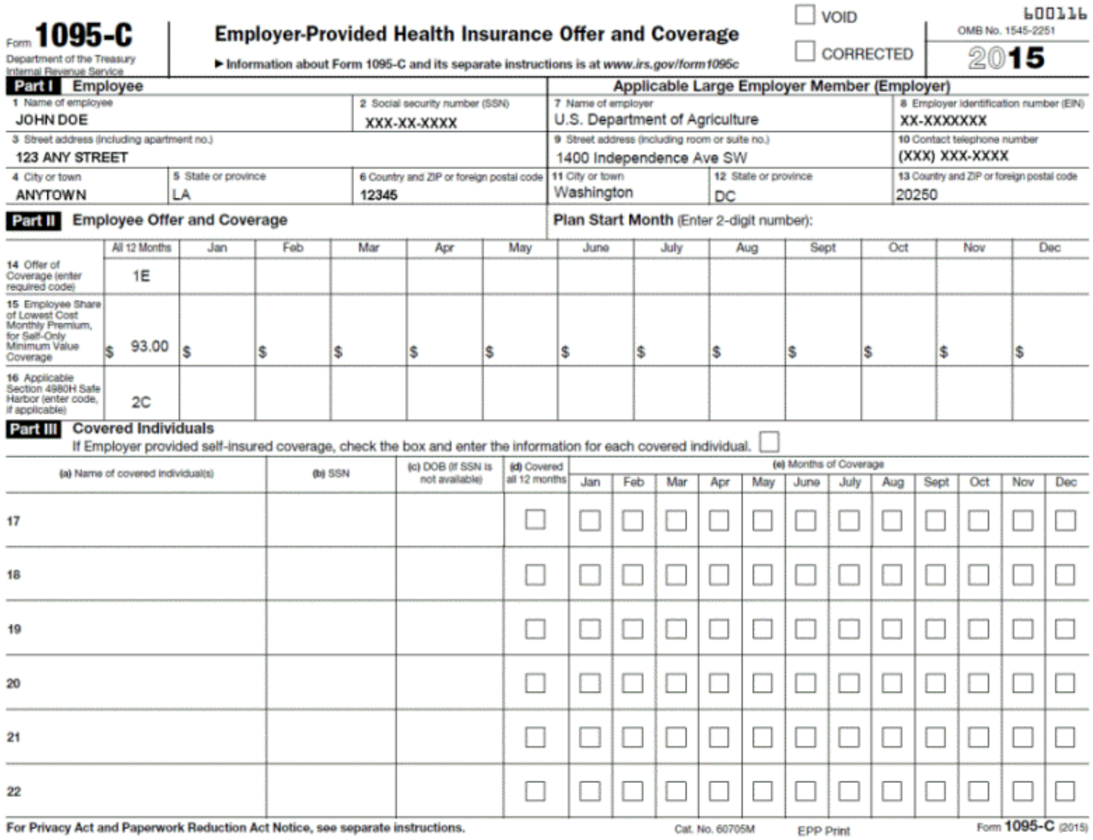
** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

SOC SEC NO.	LAST NAME	AG	T/E	T/A	C.E.S.	L/C	BRT FWD	ACC	USED	CRL	BAL.	BRT FWD	ACC	USED	CRL	BAL.	OT
XXX-XX-XXXX	DOE	05	3	09	0	0 AL	.00	000	.00	000	00 SL	.00	000	00	000	.00	OT1
XXX-XX-XXXX	DOE	07	3	09	0	0 AL	.00	000	.00	000	00 SL	.00	000	00	000	.00	OT1
XXX-XX-XXXX	DOE SR	34	3	04	0	0 AL	.00	000	.00	000	00 SL	.00	000	00	000	.00	OT1
XXX-XX-XXXX	DOE SR	43	3	09	0	0 AL	.00	000	.00	000	00 SL	.00	000	00	000	.00	OT1
XXX-XX-XXXX	DOE JR	03	1	01	0	6 AL	129 25	084	82.00	000	131 25 SL	304.50	056	35 00	000	325.50	OT1
XXX-XX-XXXX	DOE JR	12	2	08	0	0 AL	.00	000	.00	000	00 SL	00	000	00	000	.00	OT1

Figure 21: Employees with Dual Appointments

Employer-Provided Health Insurance Offer and Coverage

Report Number	Form 1095-C
Brief Description	Provides proof of health insurance coverage for an employee for income tax filing purposes. This report contains sensitive data and its use is restricted. This report is produced annually (calendar year) and is available as a hard copy. This report is also available to the Agency through RPCT and to the employee through EPP.



Form **1095-C** Department of the Treasury Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage

► Information about Form 1095-C and its separate instructions is at *www.irs.gov/form1095c*

☐ VOID ☐ CORRECTED 600116 OMB No. 1545-2251 **2015**

Part I Employee — **Applicable Large Employer Member (Employer)**

1 Name of employee: JOHN DOE	2 Social security number (SSN): XXX-XX-XXXX	7 Name of employer: U.S. Department of Agriculture	8 Employer identification number (EIN): XX-XXXXXXX
3 Street address (including apartment no.): 123 ANY STREET		9 Street address (including room or suite no.): 1400 Independence Ave SW	10 Contact telephone number: (XXX) XXX-XXXX
4 City or town: ANYTOWN; 5 State or province: LA	6 Country and ZIP or foreign postal code: 12345	11 City or town: Washington; 12 State or province: DC	13 Country and ZIP or foreign postal code: 20250

Part II Employee Offer and Coverage — **Plan Start Month** (Enter 2-digit number):

	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14 Offer of Coverage (enter required code)	1E												
15 Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage	$ 93.00	$	$	$	$	$	$	$	$	$	$	$	$
16 Applicable Section 4980H Safe Harbor (enter code, if applicable)	2C												

Part III Covered Individuals
If Employer provided self-insured coverage, check the box and enter the information for each covered individual. ☐

	(a) Name of covered individual(s)	(b) SSN	(c) DOB (If SSN is not available)	(d) Covered all 12 months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
18				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
19				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
20				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
21				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
22				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 60705M EPP Print Form **1095-C** (2015)

Figure 22: Employer-Provided Health Insurance Offer and Coverage

Error Analysis by Contact Point

Report Number	TIME 3201
Brief Description	Provides a list of T&A report conditions corrected by NFC during the processing of salary payments. It is produced each pay period when an error is detected. Timekeepers should use this report as a review with emphasis on eliminating future errors. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by contact point and POI. This report is also available through CULPRPT, P0053, Error Analysis by Contact Point and through RPCT, T&A Error Analysis Report.

REPORT ID: TIME 3201					ERROR ANALYSIS BY CONTACT POINT	DATE PREPARED: XX/XX/XX
PROCESSING PAY PERIOD: XX	AGENCY: FOOD SAFETY AND INSPECTION SERVICE SENSITIVE PERSONNEL DATA – USE IS RESTRICTED					PAGE 1
CONTACT POINT	F/O	NAME–LAST	F M	SSNO	ERROR DESCRIPTION	
37 06 0010 03 00	4848	DOE	J A	XXXXXXXXX	WEEKLY HRS OVER 36–LESS THAN 44 FOR COMP SCHED 5	
	4848	DOE	J B	XXXXXXXXX	WEEKLY HRS OVER 36–LESS THAN 44 FOR COMP SCHED 5	
	4848	DOE	J C	XXXXXXXXX	T/C HOURS DO NOT BALANCE–REGULAR TIME EXCEEDS MAXIMUM OF80 HOURS	
CONTACT POINT TOTAL T&A–S: 3	TOTAL ERRORS: 4					

Figure 23: Error Analysis by Contact Point

Error Analysis by Personnel Office Identifier

Report Number	TIME 3202
Brief Description	Provides a list of the total number of T&A Report conditions corrected by NFC during the processing of salary payments. It is produced each pay period when an error is detected. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI.

REPORT ID: TIME 3202 — ERROR ANALYSIS BY PERSONNEL OFFICE IDENTIFIER — DATE PREPARED: XX/XX/XX
PROCESSNG PAY PERIOD: 13 — PAGE 1

AGENCY	POI	TOTAL T&A–S	TOTAL ERRORS
01	5260	4	4
02	4822	326	393
03	4860	836	1141
05	4881	41	51
	4882	65	80
07	4916	62	76
	4917	32	36
	4918	11	14
	4919	30	35
	4920	60	70
	4921	7	7
	4922	40	59
	4923	32	40
	4924	24	32
	4925	22	22
	4926	18	19
	4927	52	62
	4928	34	50
	4929	50	64

Figure 24: Error Analysis by Personnel Office Identifier

Federal Wage System WGI Status Eight Week Notification

Report Number	AECO37U3
Brief Description	Provides a list of Federal Wage System employees whose WGIs are not generated due to a performance rating of less than fully successful. The WGI is not generated unless action is taken to change the performance appraisal to fully successful or greater before the effective date of the WGI. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Federal Wage System WGI Status Eight Week Notification.

```
PREPARED XX/XX/XX   AECO37U3   FEDERAL WAGE SYSTEM WGI STATUS EIGHT WEEK NOTIFICATION – AS OF XX/XX/XX          PAGE    1

              THESE FWS EMPLOYEES WILL NOT RECEIVE AN AUTOMATIC WGI – DUE TO LESS THAN SATISFACTORY PERFORMANCE
               TO GRANT AN EMPLOYEE A WITHIN–GRADE INCREASE THE AGENCY MUST CHANGE THE PERFORMANCE APPRAISAL

                                                                ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AG 03 03 AGRICULTURAL RESEARCH SERVICE                       POI   4860   BELTSVILLE, MD

        EMPLOYEE NAME                 OFFICIAL TITLE OF POSITION                   DUTY STATION LOCATION
            ORG                                 PAY                  COMMENCING             PROJECTED TYPE    INTERMITTENT
          STRUCT. LEVELS      PAY         OCC   RATE INDIVIDUAL MASTER DATE TOWARD          PAY PERIOD  OF       D A Y S
  SOC SEC NO –2–– THRU ––8–   PLAN  GRADESERIESDETR POS  NO     REC NO    WGI     D S   CODES   WGI DUE   EMPL  WORKED ELAPSED

DOE, JANE T                             BUDG ANAL                                 BELTSVILLE, MD
XXX-XX-XXXX 1019152145846589   WG  04  0   0560    0  006T3685   6N3685  XX/XX/XX  24 0100 033      XX      F/T     000    0000
DOE, JOHN A                             PLANT PHYSIOL                             BELTSVILLE, MD
XXX-XX-XXXX 6066523587458548   GS  09  1   0438    0  006P856    1A7856  XX/XX/XX  24 0100 033      XX      F/T     000    0000
DOE, JOHN B                             HYDRLGST                                  BELTSVILLE, MD
XXX-XX-XXXX 1012345678990988   GS  05  3   1234    0  001B1234   1B1234  XX/XX/XX  24 0100 033      XX      P/T     000    0000
```

Figure 25: Federal Wage System WGI Status Eight Week Notification

Health Insurance

Report Number	PACS452-1
Brief Description	Provides the total amount of employee deductions and Agency contributions for non-Federal health benefits in four different categories: self only - full-time; self only - part-time; family - full time; family - part-time. It also identifies the total number of employees enrolled in each category. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

REPORT ID: PACS452-1 FARM CREDIT ADMINISTRATION
HEALTH INSURANCE
REPORT FOR PAY PERIOD 15 XX/XX/XX TO XX/XX/XX

GROUP NO A 1226 WO

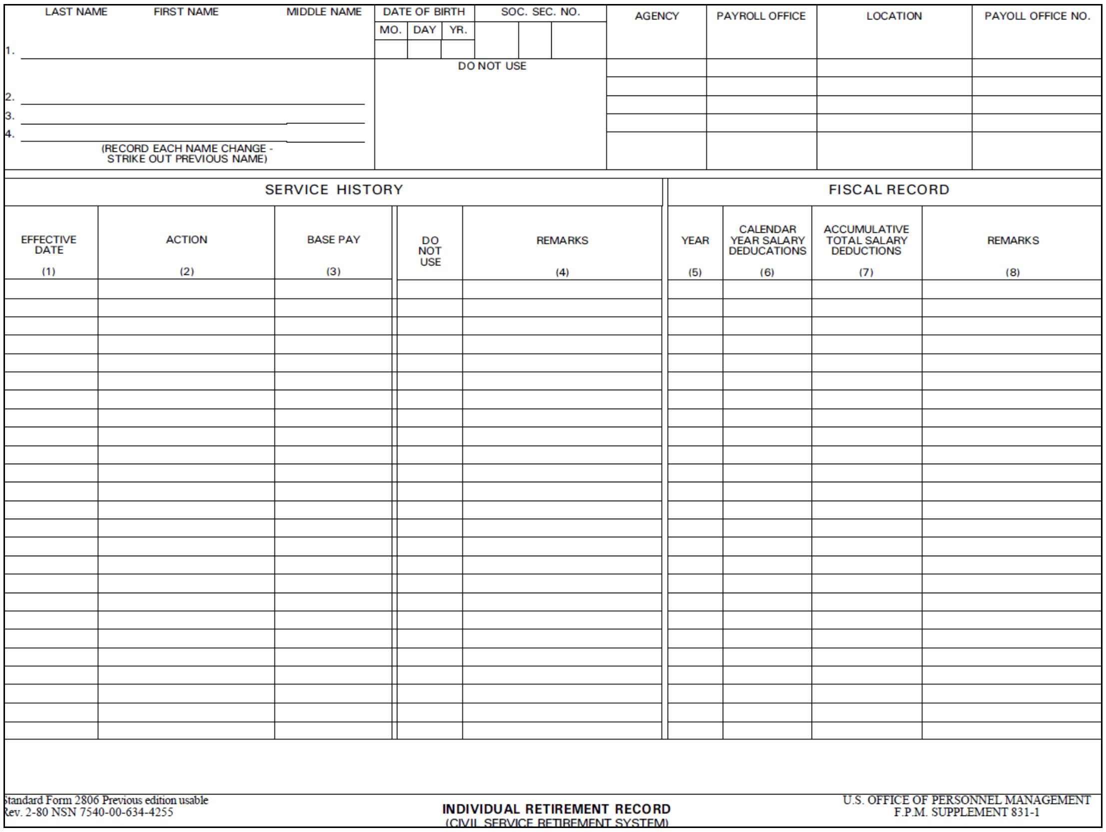
	EMPLOYEE DEDUCTIONS	AGENCY CONTRIBUTIONS	NUMBER ENROLLED
SELF ONLY – FULL-TIME	$2,213 28	$7,795.77	159
SELF ONLY – PART-TIME	$43 34	$19.61	1
SELF ONLY – UNPAID			
FAMILY – FULL-TIME	$6,348 27	$22,421.16	183
FAMILY – PART-TIME	$7 53	$98.02	1
FAMILY – UNPAID			0
TOTALS	$8,612.42	$30 334.56	334
SELF ONLY – PREMIUM ADJUSTMENTS	$0 00	$0.00	
FAMILY – PREMIUM ADJUSTMENTS	$51 66	$0.00	
PREMIUM PAYMENT	$38,946 98		

* INDICATES NUMBER OF EMPLOYEES IN UNPAID STATUS FOR WHOM NO DEDUCTIONS WERE WITHHELD – PREMIUM PAID BY AGENCY

Figure 26: Health Insurance

Individual Retirement Record (Civil Service Retirement System)

Form Number	Standard Form 2806
Brief Description	Provides a list of the entire service history and fiscal data on Civil Service Retirement System (CSRS) employees while payrolled by NFC. This form contains sensitive data and its use is restricted. Note: This record is also prepared for Post 1956 Military service for CSRS credit and for supplemental report after an employee has separated from service or retired when a salary adjustment on a previous pay period is requested. This form is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency (upon request). This report is also available through RETM.



LAST NAME	FIRST NAME	MIDDLE NAME	DATE OF BIRTH (MO. DAY YR.)	SOC. SEC. NO.	AGENCY	PAYROLL OFFICE	LOCATION	PAYOLL OFFICE NO.
1.			DO NOT USE					
2.								
3.								
4.								

(RECORD EACH NAME CHANGE - STRIKE OUT PREVIOUS NAME)

SERVICE HISTORY					FISCAL RECORD			
EFFECTIVE DATE (1)	ACTION (2)	BASE PAY (3)	DO NOT USE	REMARKS (4)	YEAR (5)	CALENDAR YEAR SALARY DEDUCATIONS (6)	ACCUMULATIVE TOTAL SALARY DEDUCTIONS (7)	REMARKS (8)

Standard Form 2806 Previous edition usable
Rev. 2-80 NSN 7540-00-634-4255

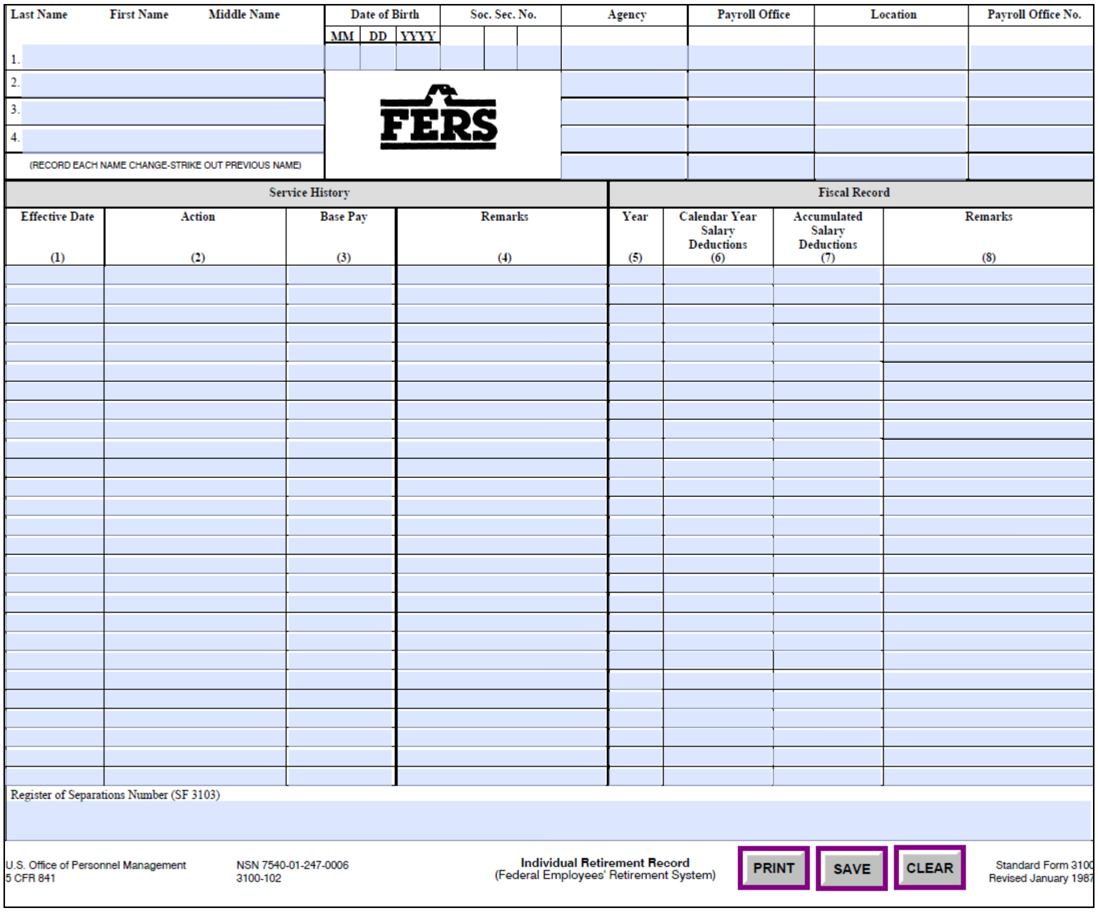
INDIVIDUAL RETIREMENT RECORD
(CIVIL SERVICE RETIREMENT SYSTEM)

U.S. OFFICE OF PERSONNEL MANAGEMENT
F.P.M. SUPPLEMENT 831-1

Figure 27: Individual Retirement Record (Civil Service Retirement System)

Individual Retirement Record (Federal Employees Retirement System)

Form Number	Standard Form 3100A
Brief Description	Provides a list of the entire service history and fiscal data on Federal Employees Retirement System (FERS) employees while payrolled by NFC. This form contains sensitive data and its use is restricted. Note: This record is also prepared for Post 1956 Military service for FERS credit and for supplemental report after an employee has separated from service or retired when a salary adjustment on a previous pay period is requested. This form is produced each pay period and is available as a hard copy or by electronic transmission. This report is also available through RETM.



Last Name	First Name	Middle Name	Date of Birth (MM DD YYYY)	Soc. Sec. No.	Agency	Payroll Office	Location	Payroll Office No.
1.								
2.								
3.								
4.								

(RECORD EACH NAME CHANGE-STRIKE OUT PREVIOUS NAME)

FERS

Service History				Fiscal Record			
Effective Date (1)	Action (2)	Base Pay (3)	Remarks (4)	Year (5)	Calendar Year Salary Deductions (6)	Accumulated Salary Deductions (7)	Remarks (8)

Register of Separations Number (SF 3103)

U.S. Office of Personnel Management
5 CFR 841

NSN 7540-01-247-0006
3100-102

Individual Retirement Record
(Federal Employees' Retirement System)

PRINT SAVE CLEAR

Standard Form 3100
Revised January 1987

Figure 28: Individual Retirement Record (Federal Employees Retirement System)

Interim Performance Evaluation Report

Report Number	Memorandum
Brief Description	Provides notification to the supervisor that a Department of Commerce employee should receive an interim performance evaluation in compliance with the Department's performance management system. The report consists of two parts. Part 1 is for Nature of Action Codes (NOAC) 702 and 721, Authority code N7M, or NOAC 702, Authority code N6M. Part 2 is for all other NOACs and authorities. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Interim Performance Evaluation Report.

SAMPLE OF INTERIM PERFORMANCE EVALUATION REPORT
(FOR NOAC 702 OR 721 AND AUTHORITY CODE N7M)
OR NOAC 702 AND AUTHORITY CODE N6M OR H5M)

MEMORANDUM FOR (TO BE COMPLETED BY PERSONNEL OFFICE)

FROM: PERSONNEL OFFICER

SUBJECT: SUMMARY PERFORMANCE RATING

THE FOLLOWING EMPLOYEE WAS ASSIGNED TO YOUR ORGANIZATION FOR AT LEAST 120 DAYS DURING THE CURRENT PERFORMANCE APPRAISAL CYCLE:

NAME: JOHN A. DOE
PAY PLAN, SERIES, GRADE: GS, 1340, 007
ORGANIZATION: GRAND RAPIDS (WSO) MICHIGAN 54 20 00 0000

BEGINNING DATE OF RATING PERIOD: XX/XX/XX
ENDING DATE OF RATING PERIOD: XX/XX/XX

UNDER THE DEPARTMENT'S PERFORMANCE MANAGEMENT SYSTEM, THIS EMPLOYEE IS ENTITLED TO A SUMMARY PERFORMANCE RATING FOR THE WORK PERFORMED DURING THE SPECIFIED PERIOD WITHIN 30 CALENDAR DAYS OF THE ENDING DATE SHOWN ABOVE.

PLEASE CONTACT (TO BE COMPLETED BY PERSONNEL OFFICE) TO DETERMINE IF YOU MUST COMPLETE A CD–396, "PERFORMANCE MANAGEMENT RECORD," FOR THIS EMPLOYEE.

Figure 29: Sample of Interim Performance Evaluation Report

SAMPLE OF INTERIM PERFORMANCE EVALUATION REPORT
(FOR ALL OTHER NOAC'S AND AUTHORITIES)

MEMORANDUM FOR (TO BE COMPLETED BY PERSONNEL OFFICE)

FROM: PERSONNEL OFFICER

SUBJECT: SUMMARY PERFORMANCE RATING

THE FOLLOWING EMPLOYEE WAS ASSIGNED TO YOUR ORGANIZATION FOR AT LEAST 120 DAYS DURING THE CURRENT PERFORMANCE APPRAISAL CYCLE:

NAME: JOHN A. DOE
PAY PLAN, SERIES, GRADE: GS, 1340, 007
ORGANIZATION: GRAND RAPIDS (WSO) MICHIGAN 54 20 00 0000

BEGINNING DATE OF RATING PERIOD: XX/XX/XX
ENDING DATE OF RATING PERIOD: XX/XX/XX

UNDER THE DEPARTMENT'S PERFORMANCE MANAGEMENT SYSTEM, THIS EMPLOYEE IS ENTITLED TO A SUMMARY PERFORMANCE RATING FOR THE WORK PERFORMED DURING THE SPECIFIED PERIOD WITHIN 30 CALENDAR DAYS OF THE ENDING DATE SHOWN ABOVE.

PLEASE COMPLETE A CD–396, "PERFORMANCE MANAGEMENT RECORD, "FOR THIS EMPLOYEE AND SUBMIT IT TO MY OFFICE BY XX/XX/XX.

IF YOU HAVE ANY QUESTIONS ABOUT THIS REQUIREMENT, CONTACT (TO BE COMPLETED BY PERSONNEL OFFICE).

Figure 30: Sample of Interim Performance Evaluation Report (For All Other NOAC's and Authorities)

Leave Error Report

Report Number	TIME4004

Report Number	TIME4004
Brief Description	Provides a list of leave discrepancies between the Payroll/Personnel database and the T&A report. It identifies year-to-date (YTD) totals from the Payroll/Personnel database and the leave balances from the latest T&A report processed. It should be reviewed and the leave records audited to determine the correct leave balance. This report contains sensitive data and its use is restricted. This report is produced on odd-numbered pay periods and is available as a hard copy or by electronic transmission. It is distributed by contact point number. This report is also available through CULPRPT, PO0152, Leave Error Report and through RPCT, Leave Error Report.

REPORT ID: TIME4004 LEAVE ERROR REPORT DATE PREPARED: XX/XX/XX PAGE 1

SENSITIVE PERSONNEL DATA – USE IS RESTRICTED

CONTACT POINT: 07 29 7780 02 00 EMPLOYING OFFICE: 0701

				* DATA BASE						* TIME AND ATTENDANCE REPORT		
SSNO	PP	TYPE LEAVE	TYPE EMPL	* PRIOR *CARRYOVER	YTD EARNED	YTD USED	YTD CR	ENDING BALANCE	P/T CARRYOVER BALANCE *	* ACCRUED THIS PP	USED THIS PP	END BALANCE
NAME: DOE JANE					SCD DATE: XX/XX/XX			A/L CATEGORY: 6				
XXX-XX-XXXX	26	ANN	1	135.00	160.00	153 00		142 00		6.00	1.00	143.00
		SICK		137.00	104.00	47 00		194 00		4.00		191.00
NAME: DOE JOHN					SCD DATE: XX/XX/XX			A/L CATEGORY: 8				
XXX-XX-XXXX	26	SICK	1	2756.00	104.00	19.00		2841.00		4.00		3114.00

TOTAL EMPLOYEES: 2 TOTAL ERRORS: 3

CHANGES ANNOTATED ABOVE ARE CERTIFIED TO BE TRUE AND CORRECT AS OF PAY PERIOD _____

CERTIFIED BY: DATE

Figure 31: Leave Error Report

Life Insurance

Report Number	PACS458-3
Brief Description	Provides a summary of the information contained in Reports PACS458-1 and PACS458-2. The information consists of the number of employees who are enrolled in a non-Federal life insurance plan and the total number of employees enrolled in each option by organizational structure. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

PACS458-3 FARM CREDIT ADMINISTRATION PAGE 01
LIFE INSURANCE
PAY PERIOD XX – XX/XX/XX TO XX/XX/XX

SENSITIVE PERSONNEL DATA – USE IS RESTRICTED

ORGANIZATION: 40 40

		DEDUCTIONS			AGENCY CONTRIBUTIONS		COVERAGE	
SSNO	EMPLOYEE NAME	BASIC	OPTION1	OPTION2	OPTION3		AMOUNT	PREMIUM
XXX-XX-XXXX	DOE, J A	10.78	3.24	.00	00	7 51	114,000	21.53
XXX-XX-XXXX	DOE, J B	15.14	1.62	.00	00	10 54	160 000	27.30
XXX-XX-XXXX	DOE, J C	17.50	26.50	9.81	1.11	12.19	185 000	67.11
XXX-XX-XXXX	DOE, J D	11.24	.00	.00	00	00	70 000	11.24
TOTALS:		54.66		9.81		30 24		127.18
NUMBER OF EMPLOYEES:	4		31.36		1.11		529 000	

Figure 32: Life Insurance

List of Covered Employees

Report Number	PACS452-2
Brief Description	Provides a list of all active employees who are enrolled in non-Federal health insurance. It also identifies the employee deduction amount, employer contribution amount, and the type of coverage. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

PACS452-2 FARM CREDIT ADMINISTRATION PAGE 1
LIST OF COVERED EMPLOYEES
FOR PAY PERIOD XX 20XX

SENSITIVE PERSONNEL DATA – USE IS RESTRICTED

SSN	EMPLOYEE NAME	EMPLOYEE DEDUCTION AMT	EMPLOYER CONTRIBUTION AMT	SELF ONLY	FAMILY	PREMIUM	ADJ IND
XXX-XX-XXXX	DOE, J A	$34.69	$141.65		X	$176.34	
XXX-XX-XXXX	DOE, J B	$34.69	$141.65		X	$176.34	
XXX-XX-XXXX	DOE, J C	$13.92	$55.13	X		$69.05	
SELF ONLY		$13.92	$55.13	1		$69.05	
FAMILY		$69.38	$283.30		2	$352.68	
TOTALS		$83.30	$338.43	3		$421.73	

Figure 33: List of Covered Employees

Listing of Employees Covered Under Option X

Report Number	PACS458-2
Brief Description	Provides information for each non-Federal life insurance option. An individual report is produced for each of the three options.

Report Number	PACS458-2
	Note: For Option 3, the Insurance Volume Column is blank. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

PACS458–2 PAGE 1

PAY PERIOD 03 – XX/XX/XX TO XX/XX/XX

POLICY NUMBER GLUG–IN44

NAME OF POLICY HOLDER:FARM CREDIT ADMINISTRATION

OPTION x	NO. ENROLLED	INSURANCE VOL.	RATE	PREMIUM
AGE GROUPS				
UNDER 35	38	3 073,000	.80/25000	98.34
35 – 39	21	2 622,000	1.05/25000	110.12
40 – 44	29	3 838,000	1.62/25000	248.70
45 – 49	17	2,430,000	2.65/25000	257.58
50 – 54	14	2,184,000	4.50/25000	393.12
55 – 59	6	756,000	6.92/25000	209.26
60 & OVER	2	318,000	10.95/25000	139.28
TOTALS	127	15 221,000		1,456.40

Figure 34: Listing of Employees Covered Under Option X

Listing of Employees on LWOP Pending OWCP for 3 or More Months

Report Number	BEAR8502
Brief Description	Provides a list of employees on leave without pay (LWOP) for at least 3 months due to a job-related injury whose Federal Employees Health Benefits (FEHB) carrier is not being paid through the automated system. The report advises the Agency to contact the Office of Workers' Compensation Program (OWCP) or the employee to determine if the FEHB premiums are being paid by OWCP. If the FEHB premiums are being paid by OWCP, the Agency should process Form SF 2810, Notice of Change in Health Benefits Enrollment, through the automated system to remove the employee's FEHB enrollment code from the PPS database. The health benefits carrier will automatically be notified when the SF 2810 is processed. Also, the Agency should notify OWCP of this change by mailing them all official personnel folder (OPF) copies of FEHB documents, including the SF 2809, Health Benefits Registration Form, and the SF 2810. The report is sorted by Social Security number. The report contains sensitive personnel data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Listing of Employees on LWOP Pending OWCP for 3 or More Months.

BEAR8502 LISTING OF EMPLOYEES ON LWOP PENDING OWCP FOR 3 OR MORE MONTHS PAGE 1
SENSITIVE PERSONNEL DATA - USE IS RESTRICTED

DEPT. XX AGENCY XX PERS. OFFICE ID: XXXX

THE FOLLOWING EMPLOYEES HAVE BEEN ON LWOP FOR AT LEAST 3 MONTHS. THEIR FEHB CARRIER IS NOT BEING PAID BY THE NATIONAL FINANCE CENTER. PLEASE CONTACT OWCP OR THE EMPLOYEES TO DETERMINE IF THE FEHB PREMIUMS ARE BEING PAID BY OWCP. IF THE PREMIUMS ARE BEING PAID BY OWCP, PROCESS A TRANSFER OUT (SF«2810) DOCUMENT THROUGH THE AUTOMATED SYSTEM TO REMOVE THE EMPLOYEEàS FEHB ENROLLMENT CODE FROM THE PAYROLL/PERSONNEL DATABASE. THE HEALTH BENEFITS CARRIER WILL AUTOMATICALLY BE NOTIFIED WHEN THE SF«2810 IS PROCESSED. PLEASE MAIL ALL OPF (OFFICIAL PERSONNEL FOLDER) COPIES OF FEHB DOCUMENTS (SF«2809àS AND SF«2810àS) TO OWCP

SOCIAL	NAME	INJ. LEAVE DATE	NOA	AUTH	NTE. DATE	FEHB
XXX-XX-XXXX	DOE, JANE H	XX/XX/XX	XXX	XXX	XX/XX/XX	XXX
XXX-XX-XXXX	DOE, JOHN A	XX/XX/XX	XXX	XXX	XX/XX/XX	XXX

Figure 35: Listing of Employees on LWOP Pening OWCP for 3 or More Months

Listing of Employee With Change in Union Dues

Report Number	PAYE3313
Brief Description	Provides a list of employees whose current union dues deduction has changed in accordance with the Table Management System (TMGT) Table 010, Union and Association Code Address. NFC will generate a pay adjustment for each employee listed on the report. The report is available to all POIs each pay period. The reports are sorted by Agency, POI, and Social Security number and retained in RFQS for 26 pay periods. The report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is available through RFQS, Listing of Employee With Change in Union Dues.

SENSIT VE PERSONNEL DATA USE IS RESTRICTED
REPORT PAYE3313 LISTING OF EMPLOYEE WITH CHANGE IN UNION DUES

AGCY	POI	SOCIAL	LAST NAME	INIT	ORG STRUCTURE	UNION NO 1 CODE LOCAL	AMT OLD	AMT NEW	% OLD	% NEW	UNION NO 2 CODE LOCAL	AMT OLD	AMT NEW	% OLD	% NE
AG	XXXX	XXX-XX-XXXX	DOE	A	AG1001000000000000	530000	5.50	7 50			000000	.00	.00		
AG	XXXX	XXX-XX-XXXX	DOE	J	AG1001000000000000	530000	5.50	7.50			000000	.00	.00		
AG	XXXX	XXX-XX-XXXX	DOE	R	AG1001000000000000	O50906	.50	1 50			000000	.00	.00		

Figure 36: Listing of Employee With Change in Union Dues

Listing of Salary Data for Sched No XXXXXX

Report Number	PAYE3313
Brief Description	Provides a list of salary data for employees detailed in Panama. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI.

```
REPORT PAYE3313            LISTING OF SALARY DATA FOR SCHED NO    0BN093                 PAGE    1

   DATE PREPARED: XX/XX/XX                    ** SENSITIVE PERSONNEL DATA - USE IS RESTRICTED **

   SSNO      AGENT   AMOUNT EMPLOYEE          COMP-DO TYPE-PAY  AGY     EMP-OFF  ACCT-STAT OK-SEQ

   RTE NO                    ACCOUNT NO       ADDRESS                         CITY STATE ZIP

XXX-XX-XXXX  0000      10 66 JOHN R DOE          3       4       70      1536     0010     000022    0BB093
 022000031                   920-4-558460

XXX-XX-XXXX  0000   1,534.90 JANE A DOE          3       4       71      1536     0010     000023    0BB093
 022000031                   920-4-558460

   TOTAL AMOUNT     1,545.56     TOTAL RECORDS        2
```

Figure 37: Listing of Salary Data for Sched No XXXXXX

Monthly Report of Federal Civilian Employment (SF 113-A Format)

Report Number	EMPR127-1
Brief Description	Provides the total paid employment by category and geographic area in Section I. Section II provides wages and lump sum payment data. Information on turnovers (accessions and separations) appears in Section III. Section IV provides data on paid employees subject to employment ceilings. This report is required by OPM. It is the Agency's responsibility to forward a copy of this report to OPM. This report is produced monthly and is available as a hard copy or by electronic transmission. It is distributed by Department, Agency, POI, and organizational structure. This report is also available through RPCT, Monthly Report of Federal Civilian Employment (SF-118A Format).

EMPR127-1 MONTHLY REPORT OF FEDERAL CIVILIAN EMPLOYMENT (SF-113-A FORMAT)
DATE PREPARED: XX/XX/XX
DEPARTMENT: DEPARTMENT: OF AGRICULTURE
AGENCY: AGRICULTURAL RESEARCH SERVICE

EMPLOYMENT COVERAGE: AGENCY REPORT DC AG SA 07 AG 07

EMPLOYMENT AS OF NOVEMBER 19XX PAYROLL FROM XX/XX/XX TO XX/XX/XX TURNOVER FROM XX/XX/XX TO XX/XX/XX

LINE	EMPLOYMENT, PAYROLL, TURNOVER, AND CEILING DATA	TOTAL ALL AREAS (A)	U.S. TERRITORIES (B)	FOREIGN COUNTRIES (C)	WASH., D.C. METRO. AREA (D)	OUTSIDE WASH., METRO. AREA (E)
	SECTION 1 – CURRENT STATUS					
1	TOTAL EMPLOYMENT	8,500	49	49	2,200	4,400
2	TOTAL IN PERMANENT POSITIONS	7,000	40	20	1,500	5 000
3	FULL-TIME	7,000	40	30	1,500	6 000
4	FULL-TIME IN PERMANENT POSITIONS	7,000	40	25	1,500	5 000
5	FULL-TIME WITH PERMANENT APPOINTMENTS	7,000	40	20	1,500	5 500
6	PART-TIME	500	1	5	200	300
7	PART-TIME WITH PERMANENT APPOINTMENTS	300	1	1	120	200
8	INTERMITTENT	220			120	100
9	COMPETITIVE SERVICE	7,000	40	25	1,500	5 000
10	WITH PERMANENT APPOINTMENTS	7,000	40	20	1,500	5 500
11	EXCEPTED SERVICE AND SES	500	1	5	200	300
12	WITH PERMANENT APPOINTMENTS	300	1	1	120	200
13	WAGE SYSTEMS	7,000	40	25	1,500	5 000
14	U.S. CITIZENS	7,000	40	20	1,500	5 500
15	NONCITIZENS					
16	TOTAL INTERMITTENTS NOT WORKING					
	SECTION II – PAYROLL					
17	WAGES AND SALARIES EARNED – TOTAL	$18,000	85	75	4,500	15,500
18	LUMP SUM PAYMENTS	$50	2		9	40
	SECTION III – TURNOVER					
19	TOTAL ACCESSIONS	90			24	70
20	TRANSFERS	1				1
21	TOTAL NE HIRES	80			22	60
22	ACCESSIONS TO THE COMPETITIVE SERVICE	50			14	40
23	NEW HIRES TO THE COMPETITIVE SERVICE	80			15	50
24	U.S. CITIZENS	50			22	40
25	TOTAL SEPARATIONS	80			14	50
26	TRANSFERS	50			3	8
27	QUITS	80			3	11
28	U.S. CITIZENS	50			14	40
	SECTION IV – EMPLOYMENT CEILING DATA					
29	TOTAL CEILING EMPLOYMENT	8,000	49	45	2,100	6 000
30	FULL-TIME WITH PERM APPIS	7 000	47	25	1 700	5 500
31	TOTAL PAYROLL TO CEILING EMPLOYEES	$15,000	90	75	4,000	13,000

CERTIFIED BY (SIGNATURE) OFFICIAL POSITION LOCATION AND TELEPHONE NUMBER DATE (MONTH, DAY, YEAR)

Figure 38: Monthly Report of Federal Civilian Employment (SF 113-A Format)

Monthly Report of Full-Time Equivalent/Work-Year Civilian Employment (SF-113G Format)

Report Number	EMPR123-1
Brief Description	Provides a number of employees subject to the ceiling worked during the reporting period. It also provides the regular hours worked including overtime and the cumulative work years by type of employment. This report is required by OPM. This report is produced monthly and is available as a hard copy or by electronic transmission. It is distributed by Department, Agency, and organizational structure. This report is always available through RPCT, Monthly Report of Full-Time Equivalent/Work-Year Civilian Employment (SF-113G Format).

EMPR123-1 MONTHLY REPORT OF FULL-TIME EQUIVALENT/WORK-YEAR CIVILIAN EMPLOYMENT (SF-113G FORMAT)

DATE PREPARED XX/XX/XX

DEPARTMENT OR AGENCY: DEPARTMENT OF AGRICULTURE
REPORT PERIOD: XX/XX/XX – XX/XX/XX
AGENCY IN AGRICULTURE: NATIONAL AGRICULTURAL LIBRARY
EMPLOYMENT COVERAGE: AGENCY LEVEL SA 03 12

EMPLOYMENT/HOURS CATEGORY	EMPLOYMENT AND HOURS (1)	EQUIVALENT FOR CURRENT PERIOD (2)	WORK – YEARS: CURRENT PERIOD (2 PAY PERIODS) (3)	WORK – YEARS: CUMULATIVE TO END OF CURRENT PERIOD (04 PAY PERIOD) (4)	CEILING (5)
1A. TOTAL PAID CEILING EMPLOYEES	360	150	12.00	21.07	
B. STRAIGHT TIME	24,800	150	11 00	23.00	
C. OVERTIME	240	2	.12	.19	
2A. FULL-TIME-PERMANENT APPT.	150	150	11 00	26.00	
B. STRAIGHT TIME	24,800	150	11 00	23.00	
C. OVERTIME	240	2	.12	.19	
3A. OTHER EMPLOYMENT	9	5	.40	1.00	
B. STRAIGHT TIME	1 000	5	.49	1.00	
C. OVERTIME					
4A. PART-TIME – PERMANENT APPT.	7	4	.30	.70	
B. STRAIGHT TIME	709	4	.39	.70	
C. OVERTIME					
5A. PART-TIME – TEMPORARY &	1		.03	.09	
INDEFINITE APPT.	70		.03	.09	
B. STRAIGHT TIME					
C. OVERTIME					
6A. FULL-TIME – TEMPORARY &	1	1	.03	.23	
INDEFINITE APPT.	160	1	.08	.23	
B. STRAIGHT TIME					
C. OVERTIME					
7A. INTERMITTENT					
B. STRAIGHT TIME					
C. OVERTIME					

TOTAL WORK-YEARS ALLOTED BY OMB FOR FISCAL YEAR

CERTIFIED .... OFFICIAL POSITION .... LOCATION .... DATE ....

Figure 39: Monthly Report of Full-Time Equivalent/Work-Year Civilian Employment (SF-113G Format)

Monthly Report of Senior Community Service Program Enrollees

Report Number	BEAR7074
Brief Description	Provides information on senior citizens employed under special authorization with the Forest Service. The report contains data for the particular appointment(s) regarding dollars, hours, or days. This report contains sensitive data and its use is restricted. This report is produced monthly and is available as a hard copy or by electronic transmission. It is distributed by Agency.

REPORT ID :BEAR7074 (REG-FOR-STA) NATIONAL FINANCE CENTER PAGE 2
ISSUE DATE XX/XX/XX MONTHLY REPORT OF SENIOR COMMUNITY SERVICE PROGRAM ENROLLEES AS OF XX/XX/XX

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

STATE	R/S/A	FOR	STAT	CITY	CTY	SOC SEC NO.	LAST NAME	SALARY	HOURS WORKED	APPT BAL.
06	51	07	0000	0010	001	XXX-XX-XXXX	DOE	4.25	48.00	000122 00 0
06	51	07	0000	0010	001	XXX-XX-XXXX	DOE	4 25	80 00	000122.00 0
06	51	07	0000	0010	001	XXX-XX-XXXX	DOE	4.25	88.00	000133.00 0

Figure 40: Monthly Report of Senior Communicty Program Enrollees

Notification of Adjustment to Longevity Date

Report Number	AECO37U7
Brief Description	Provides a list of U.S. Secret Service employees whose longevity dates have been adjusted due to hours not worked because of suspension or absence without leave (AWOL). Suspension or AWOL hours are not creditable for longevity pay purposes. It is produced in the last pay period processed for the calender year. This report contains sensitive data and its use is restricted. This report is produced annually and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Notification of Adjustment to Longevity Date.

PREPARED XX/XX/XX AECO37U7 NOTIFICATION OF ADJUSTMENT TO LONGEVITY DATE – AS OF XX/XX/XX PAGE 1
TRAC AC U S SECRET SERVICE PERS. OFF. ID. XXXX WASHINGTON DC

EMPLOYEE NAME / SOC SEC NO	ORG. STRUCTURE 2 3 4	PAY PLAN	GRADE /STEP	SALARY	ADJUSTED LONGEVITY DATE	LONGEVITY DATE BEFORE ADJUSTMENT	AWOL HOURS	SUSPENSE HOURS	LONGEVITY HOURS
DOE, JOHN									
XXX-XX-XXXX	XX XX XXXX	LE	12/02	$ 37, 019.00	01/23/90	01/22/90	8.00	.00	.00

STRUCTURE LEVEL XX XX XXXX TOTAL 1

EMPLOYING OFFICE TOTAL
1

Figure 41: Notification of Adjustment to Longevity Date

Notification of Change in Earned Annual Leave Status

Report Number	BEAR2001
Brief Description	Provides a list of employees who will obtain an increase in the number of annual leave hours earned each pay period. This report projects the changes two pay periods in advance. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by contact point number.

REPORT NO. BEAR2001 U.S. DEPARTMENT OF AGRICULTURE PAGE 1

NOTIFICATION OF CHANGE IN EARNED ANNUAL LEAVE STATUS (PROJECTED 2 PAY PERIODS)

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

ADDRESS	ACTION EFF DATE	P/P	AGENCY	T & A CONTACT POINT
FEMA REGION VIII BLDG 712 BOX 12345 DENVER, CO 80222	XX/XX/XX	13	17	17–08–1453–28–09

SOCIAL SECURITY NUMBER	EMPLOYEE NAME	EMPLOYEE STATUS	ANNUAL LEAVE EARNED PER PAY PERIOD CURRENT	ANNUAL LEAVE EARNED PER PAY PERIOD NEW	T&A CONTACT POINT TIMEKEEPER
XXX-XX-XXXX	DOE, J A	ACTIVE	4	6	98–11–0010–60–06
XXX-XX-XXXX	DOE, J B	ACTIVE	6	8	98–11–0010–60–08
XXX-XX-XXXX	DOE, J C	ACTIVE	6	8	98–11–0010–60–10

Figure 42: Notification of Change in Earned Annual Leave Status

Notification of Change (NOC) Suspense Report

Report Number	PINE5801
Brief Description	Provides a list of Direct Deposit/Electronic Funds Transfer (DD/EFT) individual account numbers and routing transit numbers of financial institutions that cannot be updated automatically in PPS and may need to be corrected by the Agency. Financial institution's account and routing number changes are transmitted by electronic tape from the Department of Treasury to NFC to update PPS. The report lists those numbers that cannot be updated automatically and is used by the Agency to correct the DD/EFT individual account numbers and/or routing transit numbers when necessary. This report contains sensitive data and its use is restricted. This report is produced daily and is available as a hard copy. It is distributed by POI.

DATE: XX/XX/XX U.S. DEPARTMENT OF AGRICULTURE PAGE 1

PINE5801 NATIONAL FINANCE CENTER

NOTIFICATION OF CHANGE (NOC) SUSPENSE REPORT

SENSITIVE PERSONNEL DATA – USE IS RESTRICTED

AGENCY: AG SUBMITTING OFFICE NUMBER: XXXX

SOCIAL SECURITY NUMBER: XXX–XX–XXXX EMPLOYEE NAME: XXXXXXXX XXXXXXXX

RETURN CODE ON NOC: C02	INFORMATION ON DATABASE	OLD INFORMATION ON NOC	NEW INFORMATION ON NOC
INDIVIDUAL ACCOUNTING NO. (DDEFT)	1111234567	00000001111234567	123456789
ROUTING TRANSIT NUMBER	9999999111	00999999911	098767800
ACCOUNT TYPE	C	C	
INDIVIDUAL ACCOUNT NO. (FA1)	9898		
ROUTING TRANSIT NUMBER	3456789122		
ACCOUNT TYPE	S		
INDIVIDUAL ACCOUNT NO. (FA2)			
ROUTING TRANSIT NUMBER	000000000000		
ACCOUNT TYPE			
ERROR MESSAGE:	INCORRECT ACCOUNT NUMBER AND ROUTING NUMBER – NO MATCHES		

Figure 43: Notification of Change (NOC) Suspense Report

Notification of Employees in Non-Pay Status With Expired NTE Dates

Report Number	AECO37T5
Brief Description	Provides a list of employees in nonpay status with expired NTE dates. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Notification of Employees in Non-Pay Status With Expired NTE Dates.

PREPARED XX/XX/XX AECO37T5 NOTIFICATION OF EMPLOYEES IN NON–PAY STATUS WITH EXPIRED NTE DATES – AS OF XX/XX/XX PAGE 1
** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AG 03 03 AGRICULTURAL RESEARCH SERVICE POI 4860 BELTSVILLE, MD

EMPLOYEE NAME	SOCIAL SECURITY NUMBER	EMPLOY–MENT STATUS	BEGINNING DATE OF NON PAY STATUS	NTE DATE	ORG STRUCTURE 2 3 4	DUTY STATION	LOCATION
DOE, JANE R	XXX-XX-XXXX	LWOP–30+	XX/XX/XX	XX/XX/XX	60 64 6435	NEW ORLEANS LA	22 1690 071
DOE, JOHN A	XXX-XX-XXXX	LWOP–30+	XX/XX/XX	XX/XX/XX	60 62 6222	LANE OK	40 2717 005
DOE, JOHN R	XXX-XX-XXXX	FURL RIF	XX/XX/XX	XX/XX/XX	60 64 6420	AUBURN AL	01 0200 081

EMPLOYING OFFICE TOTAL 3

Figure 44: Notification of Employees in Non-Pay Status With Expired NTE Dates

Notification of Expiration of Probationary or Trial Period

Report Number	AECO36T2
Brief Description	Provides a list of employees approaching expiration of probationary or trial period. It is prepared 4 months in advance of the expiration date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Notification of Expiration of Probationary or Trial Period.

PREPARED XX/XX/XX AECO36T2 NOTIFICATION OF EXPIRATION OF PROBATIONARY OR TRIAL PERIOD – AS OF XX/XX/XX PAGE 1
** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AG 07 07 FARMERS HOME ADMINISTRATION POI 4860 ATHENS, GA

EMPLOYEE NAME	S.S. NUMBER	DUTY STATION	LOCATION	ORG. STRUCTURE CODES 2	3	4	5	7	6	8	REMARK
DOE, JANE R	XXX-XX-XXXX	NEW ORLEANS, LA	22 1690 071	01	13	0014	40	00	00	00	
DOE, JOHN B	XXX-XX-XXXX	LANE, OK	40 2717 005	01	13	0005	00	00	00	00	
DOE, JOHN R	XXX-XX-XXXX	AUBURN, AL	01 0200 081	02	13	0009	00	00	00	00	

EMPLOYING OFFICE TOTAL 3

Figure 45: Notification of Expiration of Probationary or Trial Period

Notification of Longevity Percent Changes

Report Number	AECO37U6
Brief Description	Provides a list of U.S. Secret Service employees who will begin longevity pay for the first time and employees whose percentage is changing as a result of completing the number of years of service required for an increase in longevity. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Notification of Longevity Percent Changes.

PREPARED XX/XX/XX AECO37U6 NOTIFICATION OF LONGEVITY PERCENT CHANGES PAGE 1
EFFECTIVE NEXT PAY PERIOD – AS OF PAY PERIOD ENDING XX/XX/XX

TR AC AC U S SECRET SERVICE PERS. OFF ID. XXXX WASHINGTON, DC

EMPLOYEE NAME SOC SEC NO	ORG STRUCTURE 2 3 4	PAY PLAN	GRADE /STEP	SALARY	NEW PERCENT	LONGEVITY DATE	AWOL HOURS	SUSPENSE HOURS
DOE, JOHN XXX-XX-XXXX	XX XX XXXX	LE	01/04	$ 54,207.00	10	11/01/83	.00	160.00
DOE, JANE XXX-XX-XXXX	XX XX XXXX	LE	07/09	$ 94,765.00	10	06/01/96	.00	.00

STRUCTURE LEVEL TOTAL 2

EMPLOYING OFFICE TOTAL 2

Figure 46: Notification of Longevity Percent Changes

Notification of Personnel Action

Form Number	SF 50-B
Brief Description	Provides documentation of official personnel actions processed. It reflects the data exactly as processed by NFC and as contained in PPS for the employee. This form contains sensitive data and its use is restricted. This form is produced each pay period and is available as a hard copy or by electronic transmission. This report is also available through RFQS, Notification of Personnel Action.

Standard Form 50–B
Rev. 7/91
U.S. Office of Personnel Management
FPM Chapter 296–33, Subch. 4

NOTIFICATION OF PERSONNEL ACTION

1. Name (*Last, First, Middle*)	2. Social Security Number	3. Date of Birth	4. Effective Date
DOE, JOHN L	XXX-XX-XXXX	XX/XX/XX	XX/XX/XX

FIRST ACTION		SECOND ACTION	
5–A. Code: 001	5–B. Nature of Action: CANCELLATION	6–A. Code: 893	6–B. Nautre of Action: WITHIN GRADE INC
5–C. Code: ATM	5–D. Legal Authority	6–C. Code: Q7M	6–D. Legal Authority
5–E. Code	5–F. Legal Authority	6–E. Code	6–F. Legal Authority

7. FROM: Position Title and Number	TO: Position Title and Number
	MAIL CLK 020HQ Z01131

8. Pay Plan	9. Occ. Code	10. Grade/Level	11. Step/Rate	12. Total Salary	13. Pay Basis	16. Pay Plan	17. Occ. Code	18. Grade/Level	19. Step/Rate	20. Total Sala y/Award	21. Pay Basis
						GS	0305	03	02	12,900.00	PA

12A. Basic Pay	12B. Locality Adj.	12C. Adj. Basic Pay	12D. Other Pay	20A. Basic Pay	20B. Locality Adj.	20C. Adj. Basic Pay	20D. Other Pay

14. Name and Location of Position's Organization	22. Name and Location of Position's Organization
	OFFICE OF OPERATIONS MAIL & REP MGMT DIV OFF OF CH MAIL SERVICES BR MAIL SERVICES SECTION WASHINGTON DC

EMPLOYEE DATA

23. Veterans Preference	24. Tenure	25. Agency Use	26. Veterans Preference for RIF
1 (1–None, 2–5-Point, 3–10-Point/Disability, 4–10-Point/Compensable, 5–10-Point/Other, 6–10-Point/Compensable/30%)	2 (0–None, 1– Permanent, 2–Conditional, 3–Indefinite)		YES X NO

27. FEGLI	28. Annuitant Indicator	29. Pay Rate Determinant
8 WAIVED	9 NOT APPLICABLE	0

30. Retirement Plan	31. Service Comp. Date (Leave)	32. Work Schedule	33. Part-Time Hours Per Biweekly Pay Period
K FERS	XX/XX/XX	F FULL TIME	

POSITION DATA

34. Position Occupied	35. FLSA Category	36. Appropriation Code	37. Bargaining Unit Status
2 (1–Competitive Service 2–Excepted Service 3–SES General 4–SES Career Reserved)	N (E–Exempt N–Nonexempt)		1190

30. Duty Station Code	39. Duty Station (*City – County – State or Overseas Location*)
11–0010–001	WASHINGTON DIST OF COLUMBIA DC

40. Agency Data	41.	42.	43.	44.

45. Remarks

46. Employing Department or Agency			50. Signature/Authentication and Title of Approving Official
DEPARTMENT OF AGRICULTURE			
47. Agency Code	48. Personnel Office ID	49. Approval Date	
AG 98	5260	XX/XX/XX	DIRECTOR OF PERSONNEL

TURN OVER FOR IMPORTANT INFORMATION
3–Part50–315
Editions Prior to 7/91 Are Not Usable After 6/30/93
NSN 7540–01–333–6237
1–Employee Copy–Keep for Future Reference
AG 986005000101000000 PP 21 * 19XX * BATCH 52605666 208–11 204–11 AG/EO 98 5266

Figure 47: Notification of Personnel Action

Notification of Position To Be Inactivated

Report Number	AECO4604 (PMS 2)
Brief Description	Provides notification to managers of positions vacated for 9 months that will automatically be inactivated by PMSO. This tickler report is issued 6 months after the date the position is vacated. A final report is issued 1 month before the position is inactivated. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Notification of Position To Be Inactivated.

PREPARED XX/XX/XX AECO4604 (PMS 2) NOTIFICATION OF POSITION TO BE INACTIVATED PAGE 1

AG 03 03 AGRICULTURAL RESEARCH SERVICE SON 4860 WASHINGTON, DC

POSITION ORGANIZATIONAL STRUCTURE	MASTER RECORD NUMBER	POSITION NUMBER	POSITION OFFICIAL TITLE	PAY PLAN	OCCUPATIONAL SERIES	GRADE LEVEL
68 90 71 0710 00 00 00 00	002E10	RTC00005	SUPERVISORY ACCOUNTANT	GG	0610 00	14

THIS NOTIFICATION PREPARED AS OF PAY PERIOD ENDING XX/XX/XX

* * * * * THIS POSITION WAS VACATED XX/XX/XX * * * * *

UNLESS ACTION IS TAKEN TO FILL, POSITION WILL BE
INACTIVATED ON XX/XX/XX

Figure 48: Notification of Position To Be Inactivated

Notification of WGI Overdue

Report Number	BEAR2002
Brief Description	Provides a list of employees who have not received WGIs which were due within the past 10 pay periods. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI.

REPORT NO. BEAR2002 U.S. DEPARTMENT OF AGRICULTURE
NOTIFICATION OF WGI OVERDUE AS OF PP XX, 20XX

TO: EMPLOYING OFFICER
AMS, FOSTER SQUARE WEST
200 M 106TH STREET (25TH FL)
MINNEAPOLIS, MN 55000

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

PERSONNEL RECORDS AS MAINTAINED AT NFC INDICATE THAT THE EMPLOYEES LISTED BELOW HAVE NOT RECEIVED WITHIN–GRADE–INCREASES THAT ARE POSSIBLY DUE FOR 10 OR MORE PAY PERIODS.

PLEASE SUBMIT PERSONNEL ACTIONS TO NFC TO –

– GRANT THE WGI,
– WITHHOLD THE WGI,
– CORRECT RECORDS IN ERROR,

AS APPROPRIATE.
IF YOU KNOW THAT THE STATUS OF THE EMPLOYEE RENDERS HIM OR HER INELIGIBLE FOR WGI, PLEASE DISREGARD THIS NOTICE.

SSN	EMPLOYEE	PAY PLAN	GRADE	STEP	ORGZN STRUCTURE	COMP RATING	CRITICAL ELEMENT	WGI DUE DATE	DATE LAST RECORDED	WEEKS NEEDED TO NEXT STEP	WEEKS CREDITED SINCE WGI
XXX-XX-XXXX	DOE,JOHN R	GS	07	01	02–05–76–0010–00–00–00–00	FS	1	XX/XX/XX	XX/XX/XX	052	077

Figure 49: Notification of WGI Overdue

Number of Enrolled Employees

Report Number	PACS458-1
Brief Description	Provides the number of employees who are enrolled in the non-Federal life insurance plan and the total number of employees enrolled in each option. This report is sent to the insurance company by NFC. Two copies of this report are forwarded to the Agency.

Report Number	PACS458-1
	This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by insurance carrier and copy sent to the Agency.

PACS458–1 PAGE 1

PAY PERIOD 15 – XX/XX/XX TO XX/XX/XX

POLICY NUMBER GLUG–IN44

NAME OF POLICY HOLDER: FARM CREDIT ADMINISTRATION

		NUMBER ENROLLED	VOLUME
(1)	IN FORCE PREVIOUS STATEMENT	0	000
(2)	ADDITIONS/INCREASES	289	32 065,000
(3)	TERMINATIONS/DECREASES	0	000
(4)	IN FORCE ON DUE DATE	289	32 065,000
(5)	LINE 4 INCLUDES UNPAID	3	343,000
(6)	PREMIUMS PAID FOR	286	31,722,000
(7)	BASIC & PREMIUM STABILIZATION FUND RATE		.1605/$1000 *
(8)	AMOUNT DUE FOR ABOVE INSURANCE		$5,091 37
(9)	CHARGE FOR ADJUSTMENT ITEMS		$0 00
(10)	LESS REFUND FOR ADJUSTMENT ITEMS		$12 84 –
(11)	AMOUNT DUE – LIFE, AD&D, PSF		$5,078 53 **
(12)	AMOUNT DUE, OPTION 1		$1,312 04
(13)	AMOUNT DUE, OPTION 2		$485 30
(14)	AMOUNT DUE, OPTION 3		$89.45
	TOTAL AMOUNT DUE THIS PAY PERIOD		$6,965 32

* INCLUDES .037/$1000 PSF RATE
** INCLUDES $1,173.71 FOR PSF

Figure 50: Notification of WGI Overdue

Pay Period Personnel Actions on Employees Required to File SF-278

Report Number	SRPT1902
Brief Description	Provides details of personnel actions processed during the pay period on employees required to file an SF 278, Financial Disclosure Report. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Department, Agency, and organizational structure to the 4th level.

XX/XX/XX SRPT1902 PAY PERIOD PERSONNEL ACTIONS ON EMPLOYEES REQUIRED TO FILE SF–278 PAGE 1
REPORTING PERIOD:
FROM XX/XX/XX – XX/XX/XX DEPT U.S. DEPARTMENT OF AGRICULTURE ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

	MID INT	T&A CONTACT MAILING ADDRESS	NATURE OF ACTION					
LAST NAME	1ST NAME	OFFICIAL TITLE	PP/SER./GR	POS. #	TYPE APPT	SPEC EMP	HOME MAILING ADDRESS	
DOE	JANE	SCIENTIFIC PLANNING ADVISOR	GS 0401 16	007C8234	01	55	1234 HOMETOWN LANE	
	A	USDA–ARS NATL PROGRAM STAFF					ANYWHERE	MD 20944
		RM 1234 BLDG 009 BARC–WEST	SPECIAL ACT OR SERVICE AWARD					
		BELTSVILLE MD 20709						
DOE	JOHN	SECY TYPG	GS 0316 08	00CR4234	07	14	4321 45TH STREET	
	B	USDA–FGIS–ADMINISTRATOR					WASHINGTON	DC 20009
		RM 10001 P.O.BOX 99900	CONV TO EXCT APPT					
		WASHINGTON DC 20990						
DOE	JOHN	DIR. INF CENTR	ES 0889 01	DABS0298	01	55	3456 SAME STREET	
	L	USDA NFC INFO CTR					SOMEWHERE	LA 70111
		P.O.BOX 60000	CHG IN DUTY STATION					
		NEW ORLEANS LA 70160						

Figure 51: Pay Period Personnel Actions on Employees Required to File SF-278

Performance Appraisal

Form Number	AD-435
Brief Description	Provides documentation of the supervisor's evaluation of the employee's performance. It is produced 10 weeks prior to the completion of the employee's rating period. In addition to the AD-435, Report AECO36T8, Control Listing of Performance Evaluation Forms Prepared for F/T and P/T employees, will be produced listing the AD-435s that are attached. This form contains sensitive data and its use is restricted. This form is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Performance Appraisal.

United States Department of Agriculture
Performance Appraisal

1 Social Security No.	2 Position Number	3 Pay Plan	4 Occup. Series
XXX-XX-XXXX	000000000	GS	0343

5 Name (Last, First, Middle Initial)	6 Grade/Step or Pay Level	7 Appraisal Period
DOE, JOHN R.	12/01	From XX/XX/XX To XX/XX/XX

8 Official Position Title	9 Organization Structure Code
PROGRAM ANALYST	90 70 00 0000 00 00

10 Duty Station	11 Funding Unit	12 Agency Use	13 NFC Use
22 1690 071			

Instructions

Blocks 1 through 10, completed by NFC, should be reviewed and, if necessary, corrected.
Block 11. Enter funding unit number.
Block 14. Enter brief description of performance elements.
Block 15A. Check performance elements identified as critical.

Blocks 15B, 15C., 15D. Rate actual performance by entering 2 for critical elements and 1 for non-critical elements in appropriate column.
Blocks 15E, 15F, 15G. Enter total of each column.
Block 15H. Enter total from 15E, 15F and 15G.
Block 16A. Check off the correct summary rating described in decision table (16B).
Blocks 17 through 22. Self-explanatory.

14 Performance Elements	15A Critical Element (✓)	15B Exceeds Fully Successful	15C Meets Fully Successful	15D Does Not Meet Fully Successful
1) Mission Support				
2) Customer Service				
3) Process Improvement				
4) Communications				
5) Teamwork and EEO/CR				
6)				
7)				
8)				
9)				
10)				

15E Exceeds	15F Meets	15G Does Not Meet
0	0	0

15H Enter total — 15E + 15F + 15G = 15H — 15H: 0

16B Decision Table (check off Summary Rating in block 16A)

Rating of Outstanding if 15E equals 15H.
Rating of Unacceptable 1/ if any critical element is rated in 15D.
Rating of Superior if no element is rated in 15D; 15F is greater than zero; and 15E is greater than 15F.
Rating of Marginal 2/ if 15G is greater than 15E, and no critical element is rated in 15D.
Rating of Fully Successful if none of the above apply.
1/ Unsatisfactory for SES
2/ Minimally Satisfactory for SES

16A Summary Rating (See Decision Table in 16B)

- ☐ Outstanding
- ☐ Superior
- ☐ Fully Successful
- ☐ Marginal 2/
- ☐ Unacceptable 1/

1/ Unsatisfactory for SES
2/ Minimally Satisfactory for SES

17 Employee (Check off appropriate box)

I have a copy of USDA and Agency regulations on employee responsibilities and conduct; I have discussed them with my supervisor and questions have been answered to my satisfaction. ☐ Yes ☐ No

18 Employee's Signature	Date	If employee did not sign, state reason.

(Instructions for resolutions of disputes are on the reverse of employee copy.)

19 Supervisor's Signature	Date	20 Reviewer's Signature	Date

21 Approving Official's or Funding Unit Manager's Signature (optional)	Date	22 FOR SES ONLY
		PLA to ES ____________ Bonus Amount ________________

This form was electronically produced by National Production Services Staff — Form AD-435 (11/86)

Figure 52: Performance Appraisal

Performance Evaluation Eligibility for - Perm (or Temp) - Employees

Report Number	AECO37U5
Brief Description	Provides the performance evaluation eligibility date for all permanent employees and temporary employees serving under an appointment of 120 days or more. An individual report is produced for each employee. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Performance Evaluation Eligibility for Perm (or Temp) Employees.

XX/XX/XX XX/XX/XX AECO37U5 PERFORMANCE EVALUATION ELIGIBILITY FOR – PERM – EMPLOYEES PROJECTED AS OF XX/XX/XX PAGE 1

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

FL 25 25 FARM CREDIT ADMINISTRATION PERS. OFF. ID. 1736 MCCLEAN, VA

EMPLOYEE NAME SOC SEC NO	ORG. STRUCTURE 2 3 4	PAY PLAN	GRADE /STEP	TYPE APPT CODE	DATE OF ELIGIBILITY	DATE WGI DUE	DATE ENTERED ON DUTY	DATE LAST RATED	PERFORMANCE RATING
DOE. JOHN D XXX-XX-XXXX	25 10 0000	VG	05/01	04	XX/XX/XX	XX/XX/XX	XX/XX/XX	XX/XX/XX	FS
DOE. JANE M XXX-XX-XXXX	25 20 0000	VG	03/01	04	XX/XX/XX	XX/XX/XX	XX/XX/XX	XX/XX/XX	FS
DOE. L M XXX-XX-XXXX	25 20 0000	VG	04/01	04	XX/XX/XX	XX/XX/XX	XX/XX/XX	XX/XX/XX	FS

Figure 53: Performance Evaluation Eligibility for - Perm (or Temp) - Employees

Permanent Workforce - Analysis of Work Force: Federal Wage System

Report Number	CULP0117
Brief Description	Provides EEO data that reflects the number and percentage of handicapped Federal Wage System employees by employment group and pay plan. Agencies who choose to request this report through CULPRPT should submit the report request after the Biweekly Examination, Analysis, and Reporting System (BEAR) is executed for the last full pay period of the fiscal year. This report is produced annually (SF 113 cutoff) and is available as a hard copy. It is distributed by Department, Agency, and organizational structure to the 4th level. This report is also available through CULPRPT, PO117, Permanent Workforce - Analysis of Work Force: Federal Wage System.

REPORT: CULP0117 PERMANENT WORKFORCE – ANALYSIS OF WORK FORCE: FEDERAL WAGE SYSTEM PAGE 15

EEO–MO–713, EEOC FORM 440
AS OF XX/XX/XX AGENCY: 90 OFFICE OF FINANCE & MGT.

CATEGORY	WD/WG1 #EMP %	WD/WG2 #EMP %	WD/WG3 #EMP %	WD/WG4 #EMP %	WD/WG5 #EMP %	WD/WG6 #EMP %	WD/WG7 #EMP %	WD/WG8 #EMP %	WD/WG9 #EMP %	WD/WG10 #EMP %	WD/WG11 #EMP %	WD/WG12 #EMP %	WD/WG13 #EMP %	WD/WG14 #EMP %	WD/WG15 #EMP %	OTH #EMP %	TOT #EMP %
NON–IDENT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
00–01	.0	.0	.0	.0	.0	.0	.0	.0	0	0	0	0	.0	.0	0	0	.0
NO–DISB	0	1	0	0	4	5	3	0	0	1	0	0	0	0	0	1	15
04–05	.0	6.6	.0	.0	26.6	33.3	20.0	.0	0	6.6	0	0	.0	.0	0	6 6	100.0
DISB–RPTD	0	0	0	0	1	1	1	0	0	1	0	0	0	0	0	1	5
06,13–94	.0	.0	.0	.0	20.0	20.0	20.0	.0	0	20.0	0	0	.0	.0	0	20 0	100.0
TOTAL	0	1	0	0	5	6	4	0	0	2	0	0	0	0	0	2	20
WORK FORCE	.0	5.0	.0	.0	25.0	30.0	20.0	.0	0	10.0	0	0	.0	.0	0	10 0	100.0

Figure 54: Permanent Workforce - Analysis of Work Force: Federal Wage System

Permanent Workforce - Analysis of Work Force: Types of Occupations

Report Number	CULP0125
Brief Description	Provides EEO data that reflects the number and percentage of permanent employees by handicap code. Agencies who choose to request this report through the CULPRPT should submit the report request after BEAR is executed for the last full pay period of the fiscal year. This report is produced annually (SF 113 cutoff) and is available as a hard copy. It is distributed by Department, Agency, and organizational structure to the 4th level. This report is also available through CULPRPT, PO125, Permanent WorkForce - Analysis of Work Force: Types of Occupations.

REPORT ID: CULP0125 PERMANENT WORKFORCE – ANALYSIS OF WORKFORCE: TYPES OF OCCUPATIONS PAGE 2

EEO–MD–713, EEOC FORM 440
AS OF XX/XX/XX AGENCY 90 OFFICE OF FINANCE % MGT.

CATEGORY	PROF %	ADM %	TECH %	CLER %	OTHER %	BLUE %	MIXED %	SUPVR %	LDR %	NONSUP %	TOTAL %
NOT–AVAIL	3	27	8	2	0	0	.0	0	.0	.0	40
00–01	7.5	67.5	20 0	5.0	0	.0	.0	0	.0	.0	100.0
NO–DISB	67	438	50	161	9	1	.0	0	.0	1	726
04–05	9.2	60.3	6.8	22.1	1 2	.1	.0	0	.0	.1	100.0
DISB–RPTD	4	17	2	12	0	1	.0	0	.0	1	36
06,13–94	11.1	47.2	5.5	33.3	0	2.7	.0	0	.0	2.7	100.0
TOTAL	74	482	60	175	9	2	.0	0	.0	2	802
WORK FORCE	9 2	60 0	7 4	21 8	1 1	2	0	0	0	2	100 0
TOTL–TARGETED	0	2	0	1	0	1	.0	0	.0	1	4
DISABILITIES	.0	50.0	.0	25.0	0	25.0	.0	0	.0	25.0	100.0

Figure 55: Permanent Workforce - Analysis of Work Force: Types of Occupations

Permanent Workforce - Analysis of Work Force: White Collar (GS, GM, SES and All Others)

Report Number	CULP0113
Brief Description	Provides EEO data that reflects the number and percentage of handicapped, white-collar employees by employment group and pay plan. Agencies who choose to request this report through CULPRPT should submit the report request after BEAR is executed for the last full pay period of the fiscal year. This report is produced annually (SF 113 cutoff) and is available as a hard copy. It is distributed by Department, Agency, and organizational structure to the 4th level. This report is also available through CULPRPT, PO113, Permanent Workforce - Analysis of Work Force: White Collar (GS, GM, SES, and All Others).

REPORT: CULP0113 PERMANENT WORKFORCE – ANALYSIS OF WORK FORCE: WHITE COLLAR (GS,GM,SES, AND ALL OTHERS) PAGE 1
EEO–MO–713, EEOC FORM 440
AS OF XX/XX/XX AGENCY: 90 OFFICE OF FINANCE & MGT.

CATEGORY	GS–1 #EMP %	GS–2 #EMP %	GS–3 #EMP %	GS–4 #EMP %	GS–5 #EMP %	GS–6 #EMP %	GS–7 #EMP %	GS–8 #EMP %	GS–9 #EMP %	GS–10 #EMP %	GS–11 #EMP %	GS–12 #EMP %	GS/GM13 #EMP %	GS/GM14 #EMP %	GS/GM15 #EMP %	SES #EMP %	OTH #EMP %	TOT #EMP %
NON–IDENT	0	0	1	4	1	5	2	1	1	0	4	3	2	1	0	0	0	25
00–01	0	.0	4 0	16.0	4 0	20.0	8.0	4.0	4.0	0	16 0	12.0	8.0	4.0	.0	.0	.0	100 0
NO–DISB	0	0	36	109	198	165	121	32	61	10	182	173	95	38	6	6	0	1232
04–05	0	.0	2 9	8.8	16 0	13.3	9.8	2.5	4.9	8	14.7	14.0	7.7	3.0	.4	.4	.0	100 0
DISB–RPTD	0	0	7	29	26	11	10	2	2	1	17	17	7	1	2	0	0	132
06,13–94	0	.0	5 3	21.9	19 6	8.3	7.5	1.5	1.5	.7	12 8	12.8	5.3	.7	1 5	.0	.0	100 0
TOTAL	0	0	44	142	225	181	133	35	64	11	203	193	104	40	8	6	0	1389
WORK FORCE	0	.0	3.1	10.2	16.1	13.0	9.5	2.5	4.6	.7	14 6	13.8	7.4	2.8	.5	.4	.0	100 0

Figure 56: Permanent Workforce - Analysis of Work Force: White Collar (GS, GM, SES and All Others)

Position NTE Date Approaching Expiration

Report Number	AECO4604 (PMS 3)
Brief Description	Provides notification to management of employees who are approaching their NTE date. This tickler report is issued prior to the NTE date at 3, 2, and 1 month intervals. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Position NTE Date Approaching Expiration.

```
PREPARED XX/XX/XXXX   AEC04604  (PMS 3)     POSITION NTE DATE APPROACHING EXPIRATION                         PAGE   1
DJ HC HC HEADQUARTERS COMPONENTS (DOJ)                   SON 1034   WASHINGTON, DC
                                    MASTER
        POSITION                    RECORD    POSITION                                           PAY    OCCUPATIONAL  GRADE
ORGANIZATIONAL  STRUCTURE           NUMBER    NUMBER     POSITION  OFFICIAL  TITLE               PLAN   SERIES        LEVEL
HC 17 19 0100 00 00 00 00           CM001A    00000000   TRIAL ATTY                              GS     0905 00       15

THIS NOTIFICATION PREPARED AS OF PAY PERIOD ENDING  XX/XX/XX

        EMPLOYEE  NAME :   ,

                                W A R N I N G
                                ******************
                                ******************

        ***   T H E   N T E   D A T E   F O R   P O S I T I O N   I S   08/01/00 .   * * *

       *PLEASE NOTIFY YOUR PERSONNEL SPECIALIST OF INTENT FOR THIS POSITION:
        EXTENSION OF EXPIRATION DATE
        APPOINTMENT TO ANOTHER POSITION
        TERMINATION
        OTHER

* CAUTION SHOULD BE EXERCISED TO ASSURE THAT NOTIFICATION OF INTENT IS EXPRESSED SUFFICIENTLY IN ADVANCE TO AVOID OR
  MINIMIZE ANY BREAK IN SERVICE.   EMPLOYMENT MAY NOT CONTINUE AFTER THE NTE DATE UNLESS SOME TYPE OF ACTION IS TAKEN.
```

Figure 57: Position NTE Date Approaching Expiration

Position Organization Listing

Report Number	POLS15XX
Brief Description	Provides the status of all positions within the organizational structure. An asterisk in the Error Flag column indicates those positions containing data errors. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Department, Agency, and organizational structure to the 8th level. This report is also available through RPCT, Position Organization Listing (POL) and through PMSO, Position Organization Listing.

```
REPORT ID: POLS15XX.                     POSITION ORGANIZATION LISTING AS OF XX/XX/XX                    PAGE   1
                                                          ** SENSITIVE PERSONNEL DATA - USE IS RESTRICTED **
  DEPARTMENT LG          AGENCY     97    U S GENERAL ACCOUNTING OFFICE
  SVC AGENCY 97          ORG LEV 2 16     OFFICE OF INFO. RESOURCES MGMT
  SON         1339       ORG LEV 3 00
                         ORG LEV 4 0002 OFFICE OF THE DIRECTOR, OIRM

NAME                               MR-NO  IP-NO   P/P OCC SR GR/ST SUPV W/S T/A SENS FLSA OFFICIAL TITLE
SSN                          DET OR TEMP KEY DATA    * ORG STR 5-8          PRD DUTY STATION  WORKING TITLE

DOE              JANE          T   000411 00000002   ES  0002  00/07   8    F  EP   2    E    DIR OIRM
XXX-XX-XXXX              00 0000                     00 01-01-00-00         0  12-0012-001
DOE              JOHN          F   098000 00000002   GS  0045  15/07   8    F  EP   0    E    COMPR SPECLST
XXX-XX-XXXX              00 0000                     00 01-01-00-00         0  11-0012-001
VACANT                             856789 00000001   GS  0303  09/00   8            0    E    ADMV OPERS ASST
                         00 0000                     00 01-01-00-00            11-0010-001
```

Figure 58: Position Organization Listing

Premium Pay and Leave Report by Employee Name

Report Number	PAYE8501
Brief Description	Provides a total of premium pay earned and leave taken for the pay period for each employee. This report contains sensitive data and its use is restricted. Note: This report may also include premium pay and leave used for prior pay periods if a corrected T&A report was processed in the current pay period. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by contact point number.

```
                 UNITED STATES DEPARTMENT OF AGRICULTURE – OFFICE OF FINANCE & MGT
                          NATIONAL FINANCE CENTER        INFO RES MGMT DIV
PAYE8501                        PREMIUM PAY AND LEAVE REPORT                 RUN DATE: XX/XX/XX
                                                                       PP09 – XX/XX/XX – XX/XX/XX
INFO RES MGMT DIV

INFORMATION RESOURCES MANAGEMENT DIVISION

ORGANIZATIONAL STRUCTURE CODE : 90 70 10 0000 00 00
                                  PREMIUM PAY EARNED                         LEAVE USED
LAST                 F           ----------------------                    ------------
NAME                 I  OVERTIME   COMP/TIME   HOLIDAY        ANNUAL       SICK       COMP
----                 -  ---------  ----------  ---------      --------    --------    ------

DOE                  J                                          7.00
DOE                  A                                          2.75
DOE                  C                0.50                      1.50       5 00

                        ---------  ---------   ---------     ---------   ---------  ---------
SECTION TOTALS              0 00      0.50        0.00         11.25       5 00       0 00
                        ---------  ---------   ---------     ---------   ---------  ---------
                        ---------  ---------   ---------     ---------   ---------  ---------


*           PREMIUM PAY FOR PRIOR PAY PERIOD
```

Figure 59: Premium Pay and Leave Report by Employee Name

Premium Pay and Leave Report by Organizational Structure

Report Number	PAYE8502
Brief Description	Provides a total of premium pay earned and leave taken for the pay period for each organizational level. Note: This report may also include premium pay and leave used for prior pay periods if a corrected T&A report was processed in the current pay period. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by contact point number.

UNITED STATES DEPARTMENT OF AGRICULTURE – OFFICE OF FINANCE & MGT.
NATIONAL FINANCE CENTER INFO RES MGMT DIV
PAYE8502 PREMIUM PAY AND LEAVE REPORT RUN DATE: XX/XX/XX
PP09 – XX/XX/XX – XX/XX/XX
ORGANIZATIONAL STRUCTURE CODE : 90 70 10 0000 00 00
RECAP PAGE

	PREMIUM PAY EARNED			LEAVE USED		
BRANCH	OVERTIME	COMP/TIME	HOLIDAY	ANNUAL	SICK	COMP
INFO RES MGMT DIV	0.00	0 00	0.00	17.75	5.25	0.50
DATA BASE MGMT BRANCH	72.50	10.00	0.00	221.00	77.00	9.00
OPERATIONS BRANCH	517.75	27.25	0.00	1245.75	1201.75	11.00
SYSTEMS ENGINEERING BRANCH	94.75	23.75	0.00	81.75	24.00	1.75
COMPUTER RESOURCES MGMT BR	3.00	60.25	0.00	39 50	21.00	30.75
TELECOMMUNICATIONS BRANCH	0.00	28.25	0.00	79 00	36.00	18.50
D VISION TOTALS	688 00	150 00	0.00	1684 75	1365 00	71 50

* PREMIUM PAY FOR PRIOR PAY PERIOD

Figure 60: Premium Pay and Leave Report by Organizational Structure

Probationary or Trial Period Report

Form Number	AD-507
Brief Description	Provides notification of employees approaching expiration of probationary or trial period. It is produced at the end of the 7th month of the probationary/trial period. This form contains sensitive data and its use is restricted. This form is produced on even-numbered pay periods and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Probationary or Trial Period Report.

U.S. DEPARTMENT OF AGRICULTURE

PROBATIONARY OR TRIAL PERIOD REPORT JR AB–2743

IMPORTANT: THIS FORM IS DUE BACK TO THE PERSONNEL OFFICE NOT LATER THAN:

1. TYPE OF PERIOD EMPLOYEE IS SERVING:

☐ PROBATIONARY ☐ TRIAL

2. NAME	3. SOCIAL SECURITY NUMBER	4. PAY PLAN, OCCUP. SERIES AND GRAD

5. OFFICIAL TITLE OF POSITION	6. PERIOD OF SERVICE COVERED BY REPORT FROM:	TO:

7. AGENCY	8. ORGANIZATIONAL STRUCTURE CODE	9. OFFICIAL DUTY STATION

10. TENURE GROUP	11. TYPE APPOINTMENT

FOR COMPLETION BY SUPERVISOR. PLEASE SEE REVERSE OF THIS FORM BEFORE COMPLETING THE FOLLOWING ITEMS.

12. INDICATE BY S. O. M. OR U WHETHER THE EMPLOYEE'S PERFORMANCE IS SATISFACTORY, OUTSTANDING, MARGINAL, OR UNSATISFACTORY IN THE CHARACTERISTICS LISTED BELOW:

I. PERFORMANCE

Interest in Work ______ Productivity ______
Leadership ______ Quality of Work ______
Initiative ______ Self–Development ______
Dependability ______

II. CONDUCT

Attendance ______
Punctuality ______
General Deportment ______

13. NARRATIVE STATEMENT. Give your appraisal of this employee's capacity for growth and potential development. (If necessary, use additional sheets and attach.)

14. I CERTIFY THAT THE EMPLOYEE'S PERFORMANCE AND CONDUCT ARE: (Check One)

A. ☐ SATISFACTORY
B. ☐ UNSATISFACTORY

15. I RECOMMEND THAT THE EMPLOYEE BE: (Check One)

A. ☐ RETAINED IN PRESENT POSITION
B. ☐ SEPARATED FROM PRESENT POSITON

16. IF YOU RECOMMEND THAT THE EMPLOYEE BE SEPARATED FROM PRESENT POSITION, PLEASE INDICATE ANY OTHER WORK IN THIS AGENCY FOR WHICH YOU BELIEVE THE EMPLOYEE MAY BE FITTED:

17. SIGNATURE OF SUPERVISOR	18. TITLE	19. DATE
20. SIGNATURE OF REVIEWING OFFICIAL	21. TITLE	22. DATE

FORM AD – 507 (REV. 10/80)

Figure 61: Probationary or Trial Period Report

Projected Duties Follow-up

Report Number	AECO4602 (PMS 4)
Brief Description	Provides notification that a post audit or review is due on a position with projected duties and responsibilities. The tickler report identifies a particular position and organization and is issued 6 months after an employee is assigned to such a position. Follow-up reports are issued every 3 months. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Projected Duties Follow-up.

PREPARED XX/XX/XX AECO4602 (PMS 4) PROJECTED DUTIES FOLLOW-UP - AS OF XX/XX/XX PAGE 1

AG 03 03 AGRICULTURAL RESEARCH SERVICE SON 4860 BELTSVILLE, MO

POSITION ORGANIZATIONAL STRUCTURE	MASTER RECORD NUMBER	POSITION NUMBER	POSITION OFFICIAL TITLE	PAY PLAN	OCCUPATIONAL SERIES	GRADE LEVEL
03 60 64 6430 04 00 00 00	IM1302	00IM1302	SUPVRY PLANT PHYSIOL	GM	0435 11	14

* * * * * THIS POSITION IS DUE FOR POST AUDIT OR REVIEW * * *

WHEN SATISFIED WITH THE CLASSIFICATION, PLEASE CHANGE INDIVIDUAL PROJ-DTY-IND TO - M - USING PMSO1.

Figure 62: Projected Duties Follow-up

Quarterly Report on Continuation of Pay for OWCP

Report Number	AECO2402
Brief Description	Provides a list of employees who discontinued receipt of compensation from OWCP during the reporting period. This report contains sensitive data and its use is restricted. This report is produced quarterly (calendar year) and is available as a hard copy or by electronic transmission. It is distributed by Department and Agency.

XX/XX/XX AECO2402 QUARTERLY REPORT ON CONTINUATION OF PAY FOR OWCP – FROM XX/XX/XX THRU XX/XX/XX PAGE 1

AGENCY REPORT DEPT– USDA ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **
AGCY– OPT

PAY PLAN & SERIES	GR & STEP		EMPLOYEE NAME	SOC SEC NO	QTR	AGCY & EMP OFF	DUTY STATION STATE	CITY	CONTRACT SALARY	WORK DAYS	PAYMT HOURS	HRLY RATE	AMOUNT PAID	EMP APPT
AD 0000	09	1 N	DOE	XXX-XX-XXXX	4	11	0511 CA	LOS ANGELES	8.23PH	1.00	8.00	8 23	65 84	0 00
AD 0000	09	1 J	DOE	XXX-XX-XXXX	4	11	0411 CA	LONG BEACH	7.02PH	13 00	104.00	7 02	730 08	0 00
AD 0404	00	0 D	DOE	XXX-XX-XXXX	4	02	0306 NM	LUNA	4 59PH	30 50	244.00	4 59	1,119.96	1 09
AD 0083	00	0 J	DOE	XXX-XX-XXXX	4	37	4848 OR	GRANTS PASS	5 50PH	17 00	136.00	5 50	748 08	1 09
ES 0301	00	4 C	DOE	XXX-XX-XXXX	4	01	5260 DC	WASHINGTON	66400 00PA	2 00	16 00	31 92	510 72	1 01
AGENCY TOTAL			5 EMPLOYEES							63.50			3,174.68	

Figure 63: Quarterly Report on Continuation of Pay for OWCP

Quarterly Report of Employees Required to File SF-278

Report Number	SRPT1702
Brief Description	Provides a list of employees on the rolls during the reporting period who are required to file an SF 278, Financial Disclosure Report. It details the employee's title, appointment type, special employment code, and T&A contact point mailing address. This report contains sensitive data and its use is restricted. This report is produced quarterly (calendar year) and is available as a hard copy or by electronic transmission. It is distributed by Department and Agency.

XX/XX/XX SRPT1702 QUARTERLY REPORT OF EMPLOYEES REQUIRED TO FILE SF-278 PAGE 2
REPORTING PERIOD: ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **
AS OF XX/XX/XX DEPT U.S. DEPARTMENT OF AGRICULTURE
AGCY 02 AGR. MARKETING AERVICE

LAST NAME	MID INT 1ST NAME	OFFICIAL TITLE	PP/SER./GR POS. #	TYPE APPT	SPEC EMP	T&A CONTACT MAILING ADDRESS
DOE	JANE	SCIENTIFIC PLANNING ADVISOR	GS 0401 12 00003333	01	00	USDA–ARS NATL PROGRAM STAFF
	A					RM 1234 BLDG 009 BARC–WEST BELTSVILLE MD 20709
DOE	MARY	SECY TYPG	GS 0430 09 00003344	01	00	USDA–FGIS–ADMINISTRATOR
	B					RM 10001 P.O.BOX 99900 WASHINGTON DC 20990
DOE	JOHN	DIR. INF CENTR	GS 0251 09 00000033	06	14	USDA NFC INFO CTR
	K					P.O.BOX 60000 NEW ORLEANS LA 70160

Figure 64: Quarterly Report of Employees Required to File SF-278

Questionable Union Dues

Report Number	BEAR7073
Brief Description	Provides a list of employees whose personnel records indicate that the employee belongs to a union, but whose Bargaining Unit Status (BUS) code indicates that the position is ineligible for inclusion in the bargaining unit. This report contains sensitive data and its use is restricted. This report is produced on even-numbered pay periods and is available as a hard copy or by electronic transmission. It is distributed by POI.

REPORT NO. BEAR7073 NATIONAL FINANCE CENTER PAGE 2 14X
QUESTIONABLE UNION DUES
** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AGY	E.O.	ORG CODE	LAST NAME	SOC SEC NO.	DUTYSTATION	BUS	UNION	LOCAL	PAY PERIOD XX, XXXX
03	4860	30 36 3630	DOE	XXX XX XXXX	19 0230 169	7777	52	2315	14X1
03	4860	10 19 1935	DOE	XXX XX XXXX	42 9515 091	8888	01	0125	14X1
03	4860	10 12 1280	DOE	XXX XX XXXX	24 0100 033	7777	52	3147	14X1
03	4860	30 36 3620	DOE	XXX XX XXXX	17 6850 143	8888	52	3247	14X1
03	4860	50 53 5325	DOE	XXX XX XXXX	06 0020 001	8888	52	1657	14X1

TOTAL EMPLOYEES EO – : 5

Figure 65: Questionable Union Dues

Record of Documents Deleted Manually from ADJP 4316 by NFC

Report Number	ADJP0803
Brief Description	Provides a list of records deleted from the Adjustment Processing System (ADJP) during the pay period. This report is sorted by Social Security number. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI.

DATE: XX/XX/ XX
AGENCY: 37

U.S. DEPARTMENT OF AGRICULTURE
SENSITIVE PERSONNEL DATA--USE IS RESTRICTED

ADJP0803
PAGE 1

SUBMITTING
OFFICE NO: 4830

RECORD OF DOCUMENTS DELETED MANUALLY
FROM ADJP 4316 BY NFC
PAY PERIOD 20

SOCIAL SECURITY NUMBER	TRANSACTION TYPE	ADJUSTMENT PAY PERIOD	ADJUSTMENT YEAR	DEBIT/CREDIT	PASS ADJUSTMENT DELETED
XXXXXXXXX	LUMP SUM	19	95	DEBIT	03
	REASON FOR DELETION: -DUPLICATE RCD				
XXXXXXXXX	LUMP SUM	19	95	DEBIT	03
	REASON FOR DELETION: -DUPLICATE RCD				
XXXXXXXXX	LUMP SUM	19	95	DEBIT	04
	REASON FOR DELETION: -DUPLICATE RCD				

Figure 66: Record of Documents Deleted Manually from ADJP 4316 by NFC

Record of Leave Data

Form Number	Standard Form 1150
Brief Description	Issued either to transfer employee leave balances to another Department or to certify the leave balances when an employee separates from Government service. This form contains sensitive data and its use is restricted. This form is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Record of Leave Data.

RECORD OF LEAVE DATA

1 Name (Last, First, Middle)
2 Social Security Number
3 (For agency use)
4 Date and Nature of Separation
5 A Subject to 5 U.S.C. 6304(B) (45 day leave ceiling) Yes No
B Last Date Subject to 5 U.S.C. 6304(B)
C Annual Leave Balance as of That Date (Hours)
6 Total Service for Leave (as of Date of Separation)

SUMMARY OF ANNUAL AND SICK LEAVE

7 Carryover Balance From Prior Leave Year Ending — MO DAY YEAR — HOURS: Annual, Sick, Restored
8 Current Leave Year Accrual Through Pay Period Ending (if 90 day restriction applicable, explain in remarks)
9 Total
10 Reduction in Credits. If Any (current year)
11 Total Leave Taken. Current Year Through Date of Separation
12 Balance
13 Total Hours Paid in Lump Sum (includes________hours for holidays)
14 Salary Rate(s) Per Hour
15 Lump Sum Leave Dates (if part-time tour, explain in Remarks) — MO DAY YEAR HOURS
a Restored — From / Thru
b Annual Leave Above Ceiling — From / Thru
c Annual Leave Within Ceiling — From / Thru
From / Thru

ABSENCE WITHOUT PAY

16 During Leave Year in Which Separated — Hours
17 A Date of Last Equivalent Increase — MO DAY YEAR
B Total AWOP Hours Since Last Equivalent increase (except during military service and while in receipt of OWCP payments) — Hours

SUMMARY OF HOME LEAVE

18 Basic Service Period of 24 Months of Continuous Service Abroad: Date Started, Date Completed — MO DAY YEAR
19 Current 12 Months Accrual Period Began on — MO DAY YEAR
Hours Absent Without Pay Since That Date
20 Current Balance (or accrual) as of — MO DAY YEAR
Number of Days
21 Twelve Months Accrual Date as of Date of Separation
22 Dates Leave Used Prior 24 Months — FROM: MO DAY YEAR — TO: MO DAY YEAR
23 MILITARY LEAVE During Current Calendar Year — FROM: MO DAY YEAR — TO: MO DAY YEAR
A Regular–Active Duty or Training
B Special–Civil Disturbance

24 Remarks (include shore leave information, if applicable)

25 Certified Correct By (Signature)
26 Title, Agency, Address, Telephone Number
27 Date

1150–114
STANDARD FORM 1150 (REV. 12–77)
CIVIL SERVICE COMMISSION
FPM SUPP. 296–31 AND 990–2

Figure 67: Record of Leave Data

Report of Federal Employment and Wages for Three Months Period Ending (Month/Year)

Report Number	PAYE4702
Brief Description	Provides a summary of the number of Agency personnel employed within a city and State. It displays their total salaries and wages for the quarter and states the number of female employees within the overall group. This report is produced quarterly (leave year) and is available as a hard copy or by electronic transmission. It is distributed by Department.

RUN DATE XX/XX/XX	PAYE4702	U.S. DEPARTMENT OF AGRICULTURE								PAGE 1
		REPORT OF FEDERAL EMPLOYMENT AND WAGES								
STATE: 01	AL	FOR THREE MONTHS PERIOD ENDING MAR. 20XX								
AGCY: 02	AGRICULTURAL MARKETING SERVICE									
		# OF EMPLOYEES IN PP ENDING NEAREST 15TH			TOTAL SALARIES AND WAGES FOR QTR		# OF FEMALE EMPLOYEES IN PP ENDING NEAREST 15TH			
	CITY	1ST MO	2ND MO	3RD MO			1ST MO	2ND MO	3RD MO	
0010	ABBEVILLE	3	3	3	$	25 689.00	0	0	0	
0030	ADDISON	1	1	1	$	7,445.65	1	1	1	
0050	ALBERTSON	2	1	1	$	13,445.90	0	0	0	

Figure 68: Report of Federal Employment and Wages for Three Months Period Ending (Month/Year)

Report of Retirements

Report Number	AECO37T4
Brief Description	Provides a list of employees for whom a retirement action has been processed either in the pay period of the report or in the preceding pay period. It also states the type of retirement. This report contains sensitive data and its use is restricted. This report is produced on even-numbered pay periods and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Report of Retirements.

PREPARED XX/XX/XX AECO37T4			REPORT OF RETIREMENTS – AS OF XX/XX/XX						PAGE 1
AG 03 03 AGRICULTURAL RESEARCH SERVICE					POI 4860 BELTSVILLE, MD				
					** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **				
EMPLOYEE NAME / RESIDENCE			ORG. STRUCTURE CODES 2 3 4 5 6 7 8	PAY PLAN	OCC SERIES	GRADE OR SALARY	BIRTH DATE / POSITION TITLE	DUTY STATION	TYPE OF RETIREMENT	CREDITABLE SERVICE YRS MO DA
DOE, JAMES J			60 66 6612 22 00 00 00	GS	0802	09	XX/XX/XX	0270 059 13	OPTIONAL	24 05 26
BOX 1111 SAME ROAD			RETIREMENT DATE		XX/XX/XX		ENGRG TECHNCN			
WATKINSVILLE	GA	30677								
DOE, MARY			50 54 5442 05 00 01 00	GM	0440	15	XX/XX/XX	1020 017 38	OPTIONAL	30 00 09
P O BOX 1234			RETIREMENT DATE		XX/XX/XX		RES GENET INS			
FARGO	ND	58105								
DOE, JOHN			50 53 5301 00 00 00 00	GM	0401	15	XX/XX/XX	0020 001 06	OPTIONAL	24 10 22
666 ANYSTREET LANE			RETIREMENT DATE		XX/XX/XX		AGRL ADMR			
WALNUT CREEK	CA	94598								
EMPLOYING OFFICE TOTAL		3								

Figure 69: Report of Retirements

Report of TSP Separations for Pay Period XX

Report Number	CULPTSPS
Brief Description	Provides a list of employees participating in the Thrift Savings Plan (TSP) at separation. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Department and

Report Number	CULPTSPS
	Agency.

REPORT ID: CULPTSPS PAGE 1
DATE XX/XX/XX REPORT OF TSP SEPARATIONS FOR PAY PERIOD XX

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

DEPARTMENT: AG
AGENCY: 02
SON: 4822

EMPLOYEE NAME LAST	FIRST	SSNO	RET COV–CD	RET–CSR DATE	TS–VESTING DATE	TS–DEDUCTION TYPE	FACTOR	YTD–TS–DEDUCT	TYPE SEP TRANS	REG	FROZEN S/L
DOE	JANE	XXX-XX-XXXX	K	XX/XX/XX	XX/XX/XX	N/A	0000	.00		X	
DOE	JOHN	XXX-XX-XXXX	K	XX/XX/XX	XX/XX/XX	N/A	0000	.00		X	
DOE	BEN	XXX-XX-XXXX	K	XX/XX/XX	XX/XX/XX	%–BASE	0200	4.45		X	

TOTAL EMPLOYEES IN SON: 3

TOTAL EMPLOYEES IN AGENCY: 3

TOTAL EMPLOYEES IN DEPARTMENT: 3

Figure 70: Report of TSP Separations for Pay Period XX

Section 912, U.S. Overseas Civilian Allowances

Report Number	PAYE48A1
Brief Description	Provides a list of overseas employees and the amounts of various payroll/personnel and travel allowances they receive. This report contains sensitive data and its use is restricted. This report is produced every 5 years; 2008, 2013, etc., and is available as a hard copy or by electronic transmission. It is distributed by Department.

DATE PREPARED: MM/DD/YY PAYE48A1 SECTION 912
U.S. OVERSEAS CIVILIAN ALLOWANCES
CALENDAR YEAR XXXX

DEPARTMENT: AG ** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AGENCY: AGRICULTURAL RESEARCH SERVICE

POI: 5111

SSN	LAST NAME	BASE SALARY	CN TRY	C T Y	G R P	F A M	LIVING QUARTERS ALLOW.	POST ALLOW.	SEPARATE MAINT. ALLOW.	ED ALLOW.	HOME LEAVE CHARGED	ED TRAVEL	HOME LEAVE TRAVEL	REST & RECUP. TRAVEL
XXX-XX-XXXX	DOE						0.00	0.00	0.00	0.00	760 20			

Figure 71: Section 912, U.S. Overseas Civilian Allowances

Semi-Annual Accounting Data

Report Number	BEAR7077
Brief Description	Provides a list of accounting data for each employee within an Agency and is sorted by accounting distribution. This report contains sensitive data and its use is restricted. This report is produced semiannually (fiscal year) and is available as a hard copy or by electronic transmission. It is distributed by Agency.

REPORT NO. BEAR7077 NATIONAL FINANCE CENTER PAGE 1
SEMI-ANNUAL ACCOUNTING DATA DATE XX/XX/XX

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

ACCOUNT DISTRIBUT	LAST NAME & INITIALS		SOC SEC NO.	TYPE APPT	TYPE EMP	ORGAN STRUCTURE* ASCS VERIFICATION LISTING *	11T1
X99000000001	DOE	A B	XXX-XX-XXXX	06	1	02 70 25 0001	11T1
X99000000002	DOE	D K	XXX-XX-XXXX	06	1	02 14 00 0007	11T1
X99000000003	DOE	F R	XXX-XX-XXXX	06	1	02 65 70 0001	11T1
X99000000007	DOE	J A	XXX-XX-XXXX	06	1	02 48 80 0010	11T1
X99000000009	DOE	L C	XXX-XX-XXXX	06	1	02 47 70 0010	11T1

TOTAL EMPLOYEES EO – : 5

Figure 72: Semi-Annual Accounting Data

SES Recertification Notification

Report Number	AECO37VI
Brief Description	Provides a list of Senior Executive Service (SES) employees due to be recertified within 2 weeks of the "projected as of" date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency. This report is also available through RFQS, SES Recertification Notification.

PREPARED XX/XX/XX AECO37V1 SES RECERTIFICATION NOTIFICATION – PROJECTED AS OF XX/XX/XX PAGE 1

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

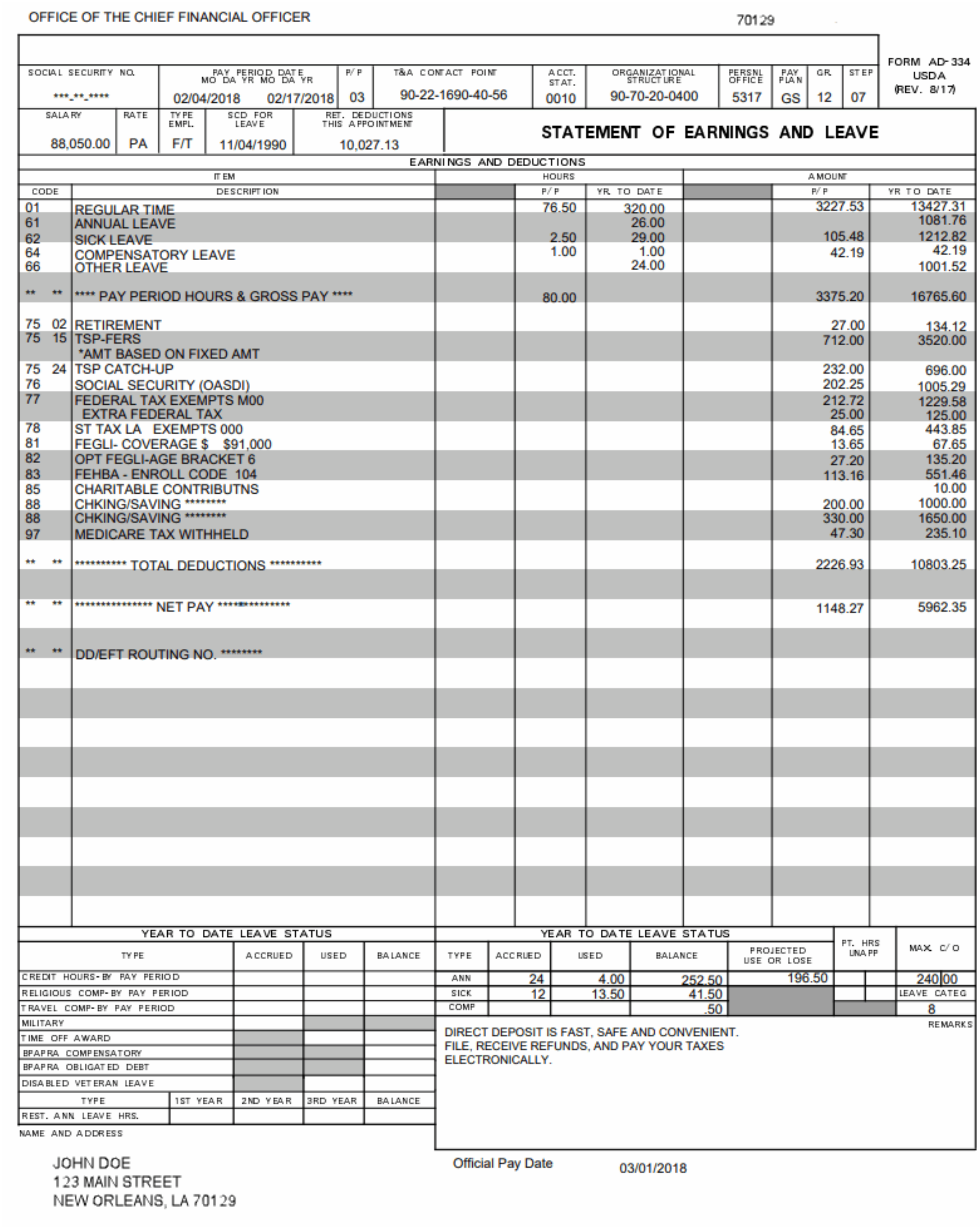
AG 05 05 AGRI STABILIZATION & CONSERV SER PERS. OFF. ID. 4882 KANSAS CITY MO

EMPLOYEE NAME / SOC SEC NO	ORG. STRUCTURE 2 3 4	PAY PLAN	GRADE /STEP	DATE ENTERED SES POSITION	DATE OF LAST CERTIFICATION	TYPE APPOINTMENT CODE
DOE, JOE						
XXX-XX-XXXX	01 08 0020	ES	00/02	XX/XX/XX	XX/XX/XX	01
DOE, JOHN L						
XXX-XX-XXXX	01 08 0020	ES	00/03	XX/XX/XX	XX/XX/XX	01
DOE, MARY	01 08 0020	ES	00/01	XX/XX/XX	XX/XX/XX	01
XXX-XX-XXXX						

Figure 73: Semi-Annual (or Annual) Report on Quality Increases

Statement of Earnings and Leave

Form Number	AD-334
Brief Description	The biweekly Statement of Earnings and Leave provides a breakdown of the employee's gross pay and biweekly deductions for the pay period and cumulative amounts for the tax year. It also provides the individual's YTD leave status for the leave year and cumulative retirement deductions. The statement is produced each pay period and is available to the employee through EPP and can be mailed under special circumstances. It is available to the Agency through RPCT.



OFFICE OF THE CHIEF FINANCIAL OFFICER 70129

FORM AD-334 USDA (REV. 8/17)

SOCIAL SECURITY NO.	PAY PERIOD DATE MO DA YR MO DA YR	P/P	T&A CONTACT POINT	ACCT. STAT.	ORGANIZATIONAL STRUCTURE	PERSNL OFFICE	PAY PLAN	GR.	STEP
-**-*	02/04/2018 02/17/2018	03	90-22-1690-40-56	0010	90-70-20-0400	5317	GS	12	07

SALARY	RATE	TYPE EMPL.	SCD FOR LEAVE	RET. DEDUCTIONS THIS APPOINTMENT
88,050.00	PA	F/T	11/04/1990	10,027.13

STATEMENT OF EARNINGS AND LEAVE

EARNINGS AND DEDUCTIONS

CODE	ITEM DESCRIPTION	HOURS P/P	HOURS YR TO DATE	AMOUNT P/P	AMOUNT YR TO DATE
01	REGULAR TIME	76.50	320.00	3227.53	13427.31
61	ANNUAL LEAVE		26.00		1081.76
62	SICK LEAVE	2.50	29.00	105.48	1212.82
64	COMPENSATORY LEAVE	1.00	1.00	42.19	42.19
66	OTHER LEAVE		24.00		1001.52
** **	**** PAY PERIOD HOURS & GROSS PAY ****	80.00		3375.20	16765.60
75 02	RETIREMENT			27.00	134.12
75 15	TSP-FERS			712.00	3520.00
	*AMT BASED ON FIXED AMT				
75 24	TSP CATCH-UP			232.00	696.00
76	SOCIAL SECURITY (OASDI)			202.25	1005.29
77	FEDERAL TAX EXEMPTS M00			212.72	1229.58
	EXTRA FEDERAL TAX			25.00	125.00
78	ST TAX LA EXEMPTS 000			84.65	443.85
81	FEGLI- COVERAGE $ $91,000			13.65	67.65
82	OPT FEGLI-AGE BRACKET 6			27.20	135.20
83	FEHBA - ENROLL CODE 104			113.16	551.46
85	CHARITABLE CONTRIBUTNS				10.00
88	CHKING/SAVING ********			200.00	1000.00
88	CHKING/SAVING ********			330.00	1650.00
97	MEDICARE TAX WITHHELD			47.30	235.10
** **	********** TOTAL DEDUCTIONS **********			2226.93	10803.25
** **	*************** NET PAY ***************			1148.27	5962.35
** **	DD/EFT ROUTING NO. ********				

YEAR TO DATE LEAVE STATUS

TYPE	ACCRUED	USED	BALANCE
CREDIT HOURS-BY PAY PERIOD			
RELIGIOUS COMP-BY PAY PERIOD			
TRAVEL COMP-BY PAY PERIOD			
MILITARY			
TIME OFF AWARD			
BPAFRA COMPENSATORY			
BPAFRA OBLIGATED DEBT			
DISABLED VETERAN LEAVE			

TYPE	1ST YEAR	2ND YEAR	3RD YEAR	BALANCE
REST. ANN LEAVE HRS.				

YEAR TO DATE LEAVE STATUS

TYPE	ACCRUED	USED	BALANCE	PROJECTED USE OR LOSE	PT. HRS UNAPP	MAX. C/O
ANN	24	4.00	252.50	196.50		240 00
SICK	12	13.50	41.50			LEAVE CATEG 8
COMP			.50			

REMARKS

DIRECT DEPOSIT IS FAST, SAFE AND CONVENIENT. FILE, RECEIVE REFUNDS, AND PAY YOUR TAXES ELECTRONICALLY.

NAME AND ADDRESS

JOHN DOE
123 MAIN STREET
NEW ORLEANS, LA 70129

Official Pay Date 03/01/2018

Figure 74: Statement of Earnings and Leave

The following provides an explanation of the items found on the statement. All or a combination of the items may appear on the statement depending on the particular type of appointment, rate of pay, prior Federal or Trust service, tax and exemption status, benefits, deductions, contributions, and pay and leave categories.

Field	Description
Social Security No.	Displays the employee's masked Social Security number.

Field	Description
Pay Period Date (MO DA YR)	Displays the beginning and ending pay period dates in month, day, and year format (MM, DD,YYYY) as they appear on TMGT Table 028, Pay Periods and Corresponding Dates by Year.
P/P	Displays the pay period number that is covered by the statement as it appears on the Payroll/Personnel Inquiry System (PINQ) Program PQ032, Payroll Listing.
T&A Contact Point	Displays the employee's contact point number as it appears on IRIS Program IR124, Address/Check Information.
Acct. Stat.	Displays the accounting station to which the employee's salary and related expenses are to be reported as it appears on IRIS Program IR101, Salary Data.
Organizational Structure	Displays the organizational structure code to which the employee is assigned to the fourth level as it appears on IRIS Program IR101.
Persnl Office	Displays the personnel office identifier of the office responsible for administering personnel and other matters relating to this employee's employment as it appears on IRIS Program IR101.
Pay Plan	Displays the pay plan applicable to the employee as it appears on IRIS Program IR101.
Gr.	Displays the grade as provided under the pay plan for the employee's position as it appears on IRIS Program IR101.
Step	Displays the step within grade as provided under the pay plan for the employee's position as it appears on IRIS Program IR101.
Salary	Displays the employee's annual adjusted salary as it appears on IRIS Program IR101, consisting of the rate of annual basic pay and locality comparability payments for the current year. Administratively Uncontrollable Overtime (AUO), availability pay, and stand-by pay amounts are obtained from the Payroll Processing System (PAYE) as of the current pay period.
Rate	Displays the employee's salary rate code for which the employee's salary is stated.
Type Empl.	Displays the employee's type of employment.
SCD for Leave	Displays the employee's service computation date (SCD) for leave as it appears on IRIS Program, IR122, SF-50B Data Elements.
Ret. Deduction This Appointment	Displays the employee's retirement deductions for the current appointment as it appears on IRIS Program IR117, Retirement Data.

The following fields are displayed in the Earnings and Deductions section:

Field	Description

Field	Description
Item (Code)	The transaction code of each item as they appear on TMGT Table 032, Transaction Codes. Valid codes and descriptions are listed in the Code and Description table following this table.
Item (Description)	The transaction code description of each item as they appear on TMGT Table 032. Valid codes and descriptions are listed in the Code and Description table following this table.
Hours (P/P)	Displays the number of hours worked and the number of hours of leave used in each category during the pay period.
Hours (Yr. to Date)	Displays the number of hours worked and the number of hours of leave used in each category year to date.
Amount (P/P)	Displays the monetary amount of hours worked and of leave used in each category during the pay period.
Amount (Yr. to Date)	Displays the monetary amount of hours worked and of leave used in each category year to date.
Pay Period Hours (P/P)	Displays the total pay period hours.
Gross Pay (P/P)	Displays the amount of gross pay for the pay period as it appears on PINQ Program PQ032.
Gross Pay (Yr. to Date)	Displays the amount of gross pay year to date as it appears on IRIS Program IR103, Salary YTD Data.
Total Deductions (P/P)	Displays the total amount of deductions for the pay period.
Total Deductions (Yr. to Date)	Displays the total amount of the year-to-date deductions.
Net Pay (P/P)	Displays the amount of net pay for the pay period as it appears on PINQ Program PQ032.
Net Pay (Yr. to Date)	Displays the amount of net pay year to date. Note: The amount of the debt for a separated employee is deducted from the net pay amount.
DD/EFT Routing No.	Displays the masked routing number of the financial institution where the employee's net pay is deposited as it appears on IRIS Program IR124.

The following fields are displayed in the Year to Date Leave Status section:

Field	Description
Type	Displays the type of leave.
Accrued	Displays the number of hours of leave accrued.
Used	Displays the number of hours used.
Balance	Displays the balance available for each type of leave.
1st Year	Displays the first year Restored Annual Leave Hours.
2nd Year	Displays the second year Restored Annual Leave Hours.
3rd Year	Displays the third year Restored Annual Leave Hours.
Balance	Displays the total number of Restored Annual Leave Hours.

The following fields are displayed in the Year to Date Leave Status section:

Field	Description
Type	Displays the type of leave.
Accrued	Displays the number of hours of leave accrued.
Used	Displays the number of hours used.
Balance	Displays the balance available for each type of leave.
Projected Use or Lose	Displays the projected number of hours of use-or-lose annual leave.
Pt. Hrs Unapp	Displays the number of unapplied hours at the end of a pay period for a part-time employee.
Max C/O	Displays the maximum number of annual leave carryover hours for the year.
Leave Categ	Displays the leave category for the employee.
Remarks	Displays remarks designated by the employee's Agency or NFC to advise an employee of changes in the statement or other pertinent information.
Name and Address	Displays the name and address of the employee as it appears on IRIS Program IR124.
Official Pay Date	Displays the official pay date for the pay period.

The following is a list of transaction codes that may appear on a Statement of Earnings and Leave:

Code	Description
01	Regular Time
01 05	Addtnl Compensation @ Basic Rate
01 07	Regular Scuba Diving 175%
01 08	Regular-Scuba Diving 200%
01 09	Training
01 67	Training-Firefighter Pay
01 69	Regular Time-Firefighter Pay
01 81	Regular Time-TSA Shift Released
01 82	Regular Time-TSA Additional Shift
01 97	Regular Scuba Diving 175%
03	Liquidated Damages/Int on Back Pay
03 02	Compensatory Damages
03 03	Miscellaneous Non-Taxable Payments
03 04	Death Gratuity Payments
03 05	Advance of Pay Non-Taxable
03 06	Canceled & Undeliverable Checks
04	Sunday Differential
04 02	Saturday Differential
04 07	Sunday-Scuba Diving 175%
04 08	Sunday-Scuba Diving 200%
04 50	Sunday Differential @ 50%
04 81	Sunday Differential-TSA Shift Rel
04 82	Sunday Differential-TSA Add Shift
04 97	Sunday-Scuba Diving 175%
05	Sunday Diff Night Diff

Code	Description
05 02	Saturday Diff Night Diff
05 81	Sun Diff w/Night Diff-TSA Shift Rel
05 82	Sun Diff w/Night Diff-TSA Add Shift
11	Night Differential
11 05	Night Diff. @ 15%
11 06	Night Diff. @ 20%
11 09	Night Diff. Training
11 10	Night Diff. @ 20%
11 15	Night Differential @ 15%
11 20	Night Differential @ 20%
11 50	Night Differential @ 50%
11 81	Night Differential-TSA Shift Rel
11 82	Night Differential-TSA Add Shift
12	Night Diff. on Compensatory Time
13	Night Diff on Sunday Double Time
14	Hazard Pay Differential
15	Environmental Differential
15 01	Regional Pay Differential
15 02	Longevity Pay
15 03	Fringe
15 04	Geographic Pay Differential
15 05	Split Shift Differential
15 06	Market Pay
16	Other Pay
16 01	Penalty Pay Regular

Code	Description
16 02	Penalty Pay Premium
16 03	Scuba Diving
16 05	Tank Cleaning Oil Regular
16 06	Tank Cleaning Oil Premium
16 07	Launch Operations
16 08	Dirty Work Regular
16 09	Dirty Work Premium
17	Commute Use Govt Auto
17 01	Sales Commissions
17 02	Earned Income Credit
17 03	Severance Pay
17 04	Incentive Pay
17 05	Ship Inspection Overtime Pay
17 06	Services/Payments
17 07	Tips/Cash/In Kind
17 08	Chauffeur Driven Auto
17 09	Parking/Taxable Fringe
17 10	Transit Subsidy
17 11	FLSA Ml Prds Dur Reg&/or AUO
17 12	FLSA Other Travel
17 13	FLSA Training
17 14	FLSA UD Roll Call
17 15	FLSA Home to Work Travel
17 16	FLSA Other Hours
17 17	Suffered and Permitted Duty
17 19	Excludable AUO Days

Code	Description
17 21	Place on Furlough
17 22	Placement in Pay Status
17 31	Reimbursable (1911) Comm/Priv
17 32	Reimbursable (1911) Comm/Priv
17 33	Non-Reimbursable OT PAYACT-1944
17 34	Users Fee - COBRA
17 36	Users Fee - AD Valorem
17 40	INS 1931 Act O/T - Air/Sea Weekdays
17 41	INS 1931 Act O/T - Land Bor Weekdays
17 42	INS 1931 Act O/T - Not Worked
17 43	INS 1931 Act O/T Air/Sea Sun/Hldy
17 44	INS 1931 Act O/T Land Bordr Sun/Hol
17 45	Continuation of Pay
17 46	COPRA Settlement Agreements
17 50	Travel Reimbursements
17 51	On Call Premium Pay
17 52	Missed Meals Allowance Non Taxable
17 60	Domestic Partner (Taxable Fringe)
17 70	Health Subsidy-Taxable
17 71	Within Tour OT Substituted for LWOP
17 80	BPAPRA Within Tour Overtime Worked
17 83	Within Tour Overtime Not Worked
17 84	BPAPRA Training Credit
17 85	BPAPRA Canine Care
17 86	Within Tour Overtime - Exempt

Code	Description
17 87	Irregular OT - Substitute for Debt
17 88	Irregular OT - Substitute for LWOP
18	Overtime Grain Appeal
19	Overtime Over 8
19 07	Overtime-Scuba Diving 175%
19 08	Overtime-Scuba Diving 200%
19 97	Overtime-Scuba Diving 175%
21	Overtime - Premium Rate
21 07	Overtime-Scuba Diving 175%
21 08	Overtime-Scuba Diving 200%
21 11	FS Emergency Fire Suppression
21 17	OT Sub-Within Tour OT Not Worked
21 20	OT Paid @ Double Rate
21 22	Call Back OT Double Rt
21 30	Commute OT Triple Rate
21 71	OT Substituted - LWOP, AWOL, SUSP
21 83	Overtime Used to Repay Debt
21 96	Max Out for Overtime Protection
21 97	Overtime-Scuba Diving 175%
22	Overtime Double for Sunday Work
23	Overtime Travel under FLSA
24	Overtime Travel Under Title V
25	Overtime Over 40 With Night Diff.
26	Overtime Over 8 With Night Diff.
27	Overtime Plus 10% of Overtime Rate
29	Credit Hours Worked

Code	Description
30	Overtime Call Back No Work Performed
31	Holiday Worked
31 07	Holiday-Scuba Diving 175%
31 08	Holiday-Scuba Diving 200%
31 10	Holiday Pay Reg Rate
31 97	Holiday-Scuba Diving 175%
32	Compensatory Time Worked
32 77	Comp Time Worked-Religious Observ
32 78	Compensatory Travel Earned
32 80	BPAPRA Comp Time Earned
33	Overtime Call Back No Work on Sun
34	FLSA
34 01	Back Pay on FLSA
35	Union/Contract Neg.
35 05	Union/Contract Neg.
35 10	Union/Contract Neg.
35 15	Union/Contract Neg.
35 20	Union/Contract Neg.
35 50	Union/Contract Neg.
35 69	Union/Contract Neg.
36	Union/Midterm Neg.
36 05	Union/Midterm Neg.
36 10	Union/Midterm Neg.
36 15	Union/Midterm Neg.
36 20	Union/Midterm Neg.

Code	Description
36 50	Union/Midterm Neg.
36 69	Union/Midterm Negtn-Firefighter Pay
37	Union/Ongoing LMR Act.
37 05	Union/Ongoing LMR Act.
37 10	Union/Ongoing LMR Act.
37 15	Union/Ongoing LMR Act.
37 20	Union/Ongoing LMR Act.
37 50	Union/Ongoing LMR Act.
37 69	Union/Ongoing LMR Act-Fireftr Pay
38	Union/Griev./Appeal Rep
38 05	Union/Griev./Appeal Rep
38 10	Union/Griev./Appeal Rep
38 15	Union/Griev./Appeal Rep
38 20	Union/Griev./Appeal Rep
35 50	Union/Griev./Appeal Rep
35 69	Union/Grvnc/Apl Rep-Fireftr Pay
39	Shore Leave Earned
40	Home Leave Earned
41	Prem Pay on an Annual Basis (DLO)
41 02	LEO Special Differential
41 11	Supplemental Pay 25%
41 12	Supplemental Pay 12.5%
42	Lump-Sum Payment for Annual Leave
42 01	Thru Date (MO-DA - YR)
42 02	Holiday Hrs Included
43	Compensatory Time Paid

Code	Description
44	Cash Award
44 04	Spot Award
44 05	Compensatory Damages (Taxable)
44 06	PFP Bonus Award
44 07	Performance Bonus
44 08	PMRS Performance Award
44 09	Lump Sum Payout
44 10	Separation Incentive
44 11	Travel Incentive Payment (Taxable)
45	Cost of Living Allowance
45 01	Begin Cost of Living Allowance
46	Post Differential
46 01	Begin Post Differential
47	Stop Cost of Living Allowance
48	Stop Post Differential
49	Remote Worksite Allowance
49 01	Horse Allowance
49 02	Travel Allowance
49 03	Quarters Allow Not Taxable
49 04	Quarters Allow Taxable
49 05	Non-Watch Stand Allow/Month LV SUP
49 06	Relocation Allow Subj to With Hold
49 07	Reloc. Allow. Not Subj. to Withhold
49 08	Reassignment Allowance
49 09	Danger Pay Allowance

Code	Description
49 16	Reloc Allow Subj to Withhold 1993
49 17	Reloc Alw Not Subj to w/Hold 1993
50	Credit Hours
50 08	Credit Hours Paid
51	Comparability Allowance
51 01	Uniform Allowance (Taxable)
51 02	Separate Mntce Allow Non Taxable
51 03	Separate Mntce Allow Taxable
51 04	Post Allowance
51 05	Education Allowance
51 06	Foreign Language Allowance
51 07	Recruitment Incentive (Taxable)
51 08	Uniform Allowance (Tax Exempt)
51 09	Supvry Differential
52	Retention Allowance
52 01	Recruitment Allowance
52 02	Relocation Allowance
52 03	Hazardous Duty Allowance (Taxable)
52 04	Professional Liability Ins. Non-Tax
52 05	Transit Benefits
52 06	Parking Benefits
52 07	Choice Credits
52 08	Life Cycle Program
52 09	Certification/License Fees
53 01	HCA Allowance for OTS FSA
53 02	DCA Allowance for OTS FSA

Code	Description
53 03	Nights Out Stipend
53 04	Fitness Reimbursement
53 05	Overseas Tour Renewal Agrmt Trvl
53 06	Education - Taxable
53 07	Transitional COLA (Taxable)
53 08	OVS Tr Rnwl Agrmt Trvl Non-Taxable
53 09	In Lieu of Stipend (Taxable)
54	Telework-Routine
54 01	Telework-Situational
56	Student Loan Benefit/EABP Taxable
56 01	Educ Asst Ben Pgm Non-Taxable
56 02	New York City Commutation Stipend
56 03	Hostile Fire Pay (Taxable)
56 04	Hostile Fire Pay (Non Taxable)
56 05	Extended Assgnmnt Incen (Taxable)
56 06	Cell Phone Payment (Taxable)
56 07	Home Based Com/DP Allwnce (Taxable)
56 08	Examiner Stipend (Taxable)
56 09	Examiner Stipend (Non Taxable)
56 10	Reservist Diff Over 30 Day-No FICA
56 11	Reservist Diff Under 30 Day-FICA Wthld
59	Shore Leave
59 04	Shore Leave
59 05	Shore Leave
59 06	Shore Leave

Code	Description
60	Comp Time Used-Religious Observ
60 05	Comp Time Used-Rel. Obsrvnc. @ 15%
60 10	Comp Time Used-Rel. Obsrvnc. @ 20%
60 15	Comp Time Used-Rel. Obsrvnc. @ 15%
60 20	Comp Time Used-Rel. Obsrvnc. @ 20%
60 50	Comp Time Used-Rel. Obsrvnc. @ 50%
60 68	Comp Leave Relg Obsv-Fftr OT Pay
60 69	Comp Leave Relg Obsv-Fireftr Pay
61	Annual Leave
61 04	Annual Leave
61 05	Annual Leave
61 06	Annual Leave
61 10	Annual Leave
61 15	Annual Leave
61 18	A/L With 15% Night Diff
61 20	Annual Leave
61 50	Annual Leave
61 61	Annual Leave Donated
61 68	Annual Leave-Firefighter OT Pay
61 69	Annual Leave-Firefighter Pay
62	Sick Leave
62 04	Sick Leave
62 05	Sick Leave
62 06	Sick Leave
62 10	Sick Leave
62 15	Sick Leave

Code	Description
62 20	Sick Leave
62 50	Sick Leave
62 61	Sick Leave Donated
62 62	Fed Emply Family Friendly Leave Act
62 63	Disabled Veteran Leave
62 66	Sick Leave-FFLA Fireftr OT Pay
62 67	Sick Leave-FFLA Firefighter Pay
62 68	Sick Leave-Firefighter OT Pay
62 69	Sick Leave-Firefighter Pay
63	Restored Annual Leave
63 04	Restored Annual Leave
63 05	Restored Annual Leave
63 06	Restored Annual Leave
63 10	Restored Annual Leave
63 15	Restored Annual Leave
63 20	Restored Annual Leave
63 50	Restored Annual Leave
63 61	Restored Annual Leave Donated
63 68	Restored Annual Leave-Fftr OT Pay
63 69	Restored Annual Leave-Fireftr Pay
64	Compensatory Leave
64 61	Regular Comp Leave Donated
64 66	Comp Leave Used Travel-Fftr OT Pay
64 67	Comp Leave Used Travel-Fireftr Pay
64 68	Comp Leave Used-Firefighter OT Pay

Code	Description
64 69	Comp Leave Used-Firefighter Pay
64 71	BPA Comp Lv Used-LWOP Substitution
64 78	Compensatory Travel
64 80	BPAPRA Comp Leave Used
64 83	BPAPRA Comp Lv Used-Debt Repayment
65	Regular Military Leave
65 04	Regular Military Leave
65 05	Regular Military Leave
65 06	Regular Military Leave
65 10	Regular Military Leave
65 15	Regular Military Leave
65 20	Regular Military Leave
65 50	Regular Military Leave
65 68	Regular Military Leave-Fftr-OT Pay
65 69	Regular Military Leave-Fireftr Pay
66	Other Leave
66 04	Other Leave
66 05	Other Leave
66 06	Other Leave
66 10	Other Leave
66 15	Other Leave
66 20	Other Leave
66 50	Other Leave
66 61	Time Off Awards
61 62	Time Off Awards
61 63	Time Off Awards

Code	Description
61 64	Time Off Awards
66 66	Time Off Award-Firefighter OT Pay
66 67	Time Off Award-Firefighter Pay
66 68	Other Leave-Firefighter OT Pay
66 69	Other Leave-Firefighter Pay
67	Injury Leave
67 03	Injury Leave
67 04	Injury Leave
67 05	Injury Leave @ 15%
67 06	Injury Leave
67 07	Injury Leave
67 10	Injury Leave @ 20%
67 15	Injury Leave @ 15%
67 20	Injury Leave @ 20%
67 50	Injury Leave @ 50%
67 68	Injury Leave-Firefighter OT Pay
67 69	Injury Leave-Firefighter Pay
68	Emergency Military Leave
68 04	Emergency Military Leave
68 05	Emergency Military Leave @ 5%
68 06	Emergency Military Leave
68 10	Emergency Military Leave @ 10%
68 15	Emergency Military Leave @ 15%
68 20	Emergency Military Leave @ 20%
68 50	Emergency Military Leave @ 50%

Code	Description
68 68	Emercy Military Leave-Fftr OT Pay
68 69	Emercy Military Leave-Fftr Pay
69	Home Leave
69 04	Home Leave
69 05	Home Leave
69 06	Home Leave
69 10	Home Leave
69 15	Home Leave
69 20	Home Leave
69 50	Home Leave
70	Logging - Forfeiture of Pay
71	Leave Without Pay
72	Absence Without Official Leave
73	Suspension
74	Furlough
75	Retirement
75 01	Retirement
75 02	Retirement
75 03	Retirement
75 04	Retirement Other
75 05	Thrift Savings - FERS
75 06	Thrift Savings - CSRS
75 07	Thrift Savings - Other
75 08	Panama Social Security
75 09	Panama Soc Sec Health
75 10	Retirmnt

Code	Description
75 11	Retirement
75 12	Retirement
75 13	Retirement
75 14	Retirement Other (Tax Def)
75 15	TSP-FERS
75 16	TSP-CSRS
75 17	401(K)
75 18	Panama Social Security
75 19	Panama Health Only
75 20	D.C. Retirement
75 21	COVA Judges Retirement @ 1%
75 22	COVA Judges Retirement @ 1% + Spouse @ 2.2%
75 23	401 (K) Catch-Up
75 24	TSP Catch-Up
75 25	401 (K) Taxable (OTS)
75 26	ROTH 401 (K)
75 27	ROTH 401 (K) Catch-Up
75 28	Retirement
75 29	Retirement
75 30	Retirement
75 31	ROTH TSP-FERS
75 32	ROTH TSP-CSRS
75 33	ROTH TSP-Catch-Up
76	Social Security (OASDI)
76 10	Social Security Tax- - Travel

Code	Description
76 99	Social Security (OASDI) - Rate Change
77	Federal Tax
77 01	Extra Federal Tax
77 10	Federal Tax - -Travel
77 99	Formula Change
78	State Tax
78 01	Extra State Tax
78 02	Panama Income Tax
78 03	Panama Education Tax
78 04	Old Fund Liability Tax
78 10	State Tax -- Travel
78 99	Formula Change
79	City Tax
79 01	Extra City Tax
79 99	Formula Change
80	County Tax
80 01	Extra County Tax
80 99	Formula Change
81	FEGLI
81 09	Life Insurance Non-Federal
81 10	LTD High Option
81 11	L-Term Care Employee and/or Spouse
81 13	Long Term Care Other Dependents
81 14	Immediate Benefit Plan
81 17	Vol Accidental Death Dismemberment
81 99	Rate Change

Code	Description
82	Optional FEGLI
82 09	Opt Ins - Age Bracket
82 10	24 Hour Accidental
82 11	Vol Short Term Disab.
82 99	Rate Change
83	FEHBA
83 09	Health Benefits Non Federal
83 10	Dental Plan
83 11	Vision Plan
83 12	Dental/Vision Combo Plan
83 99	Rate Change
85	Charitable Contributions
86	Commissary
87	Union/Association Dues
87 01	Association Dues
87 03	Revocation Received
87 04	Dues w/Holding Ceased
87 05	Insuff Wages for Dues
87 08	Union Local Cancelled
87 13	Adjt to Dues Deducted
87 14	Dues Change
87 15	Misc Fees/Dues
87 16	CGMA Contribution
88	Allotmt Acct
88 40	TSP Loan Repay (Fed)

Code	Description
88 50	TSP Loan Repay (Non-Fed)
88 60	Health Savings Account
89	Imprest Fund
90	Travel Advance Collections
91	Quarters
91 01	Quarters - Not Taxable
91 02	Quarters - Taxable
92	Meals
93 10	Flexfund DCA
93 11	Flexfund HCA
93 12	OCC Parking FSA
93 13	Smithsonian TST FSA DCA
93 14	Smithsonian Trust FSA HCA
94	CSR Mil Serv Deposits
95	CSR Civil Serv Deposits
97	Medicare Tax Withheld
97 10	Medicare Tax Withheld - Travel
97 99	Medicare Tax Withheld (Rate Rev)
98	TSP Collection
98 34	TSP Collection
98 35	TSP Collection Tax Def
98 36	TSP Collection Non Def
99	Miscellaneous Deduction
99 01	Salary Overpayment
99 02	Duplicate Salary Paymt
99 03	Salary Advance Collctn

Code	Description
99 04	Lump Sum Overpayment
99 05	Lump Sum Recovery
99 06	Overdrawn Leave
99 07	OWCP Leave Buy-Back
99 08	Forfeiture of Pay
99 09	Collection for Quick Service
99 15	Salary Overpayment
99 16	Salary Overpayment
99 17	Salary Garnishment
99 19	FEHBA
99 20	Adjmt FICA and Retiremt
99 21	FEHBA
99 22	FEGLI
99 23	Quarters
99 24	Quarters (Not Taxed)
99 25	Meals
99 26	Commissary
99 27	Child Support/Alimony
99 28	LWOP-FEHBA
99 29	Credit Net Pay
99 30	Bankruptcy
99 31	Delinquent FMHA Loans
99 32	Occupational Privilege Tax
99 33	Educational Loans
99 34	Thrift Savings

Code	Description
99 35	Smithsonian Life Insurance (Nonpay Status)
99 40	F-2159 Pay Deduct Agree
99 41	Travel Advance
99 42	Property Loss
99 43	Subsistence
99 44	Personal Phone Calls
99 45	Parking Fees
99 46	Jury Fees Recovery
99 47	Moving Expenses Recovery
99 48	Duplicate Savings Allot
99 49	Travel Overpayment
99 50	Commercial Garnishments
99 52	TOP Federal Delinquent Debt
99 53	TOP Tax Levies
99 55	IRS Tax Levy
99 56	Student Loan Pmt Benefit
99 57	Travel Charge Card Salary Offset
99 58	CGMA (Assistance)
99 60	Discretionary Allotment Pd Bi-Wkly
99 61	Discretionary Allotment Pd Monthly
99 70	Special Deduction
99 75	To SPPS In Death and Indebtedness
99 81	Revocation of Authoriz
99 82	Change/Corr of Auth
99 83	New Authorization
99 85	Transfer-In

Code	Description
99 87	Allotment Revocation
99 90	Misc Deduction
99 91	Misc Collection
99 92	Noncash Fringe Benefit
99 93	UNIF-SUC-COLA-Deduction
99 94	CSR Mil Serv Deposits
99 95	CSR Civ Serv Deposits
99 96	FERS Mil Serv Deposits

Statement for Recipients of Miscellaneous or Interest Income or Taxable Grants

Form Number	Form 1099
Brief Description	Provides a summary of miscellaneous, interest income, or taxable grants that the employee received during the calendar year. This form contains sensitive data and its use is restricted. This form is produced annually (calendar year) and is available as a hard copy.

U.S. DEPARTMENT OF AGRICULTURE
NATIONAL FINANCE CENTER
P O BOX 60000
NEW ORLEANS, LA 70160

FEDERAL IDENTIFYING NO. 72–0564834F
FORM 1099: STATEMENT FOR RECIPIENTS OF 20XX MISCELLANEOUS OR INTEREST INCOME OR TAXABLE GRANTS

RECIPIENT'S IDENTIFYING NO. 0009999999

JANE R DOE
1990 UNITED STATE ST.
WASHINGTON, D.C. 20250

TYPE INCOME	AMOUNT
NON–EMPLOYEE COMPENSATION	$650.00

THE ABOVE COMPENSATION REPRESENTS SERVICES PERFORMED
FOR THE FOLLOWING AGENCY OR AGENCIES:

NATIONAL FINANCE CENTER

(SEE OTHER SIDE FOR INSTRUCTIONS TO RECIPIENT)

Figure 75: Statement for Recipients of Miscellaneous or Interest Income or Taxable Grants

Supervisory or Managerial Probationary Period Report

Form Number	AD-773
Brief Description	Provides documentation of the supervisor's evaluation of the employee's performance while serving a probationary period as a permanent first-time supervisor or manager. This form is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency. This report is also available through RFQS, Supervisory of Managerial Probationary Period Report.

UNITED STATES DEPARTMENT OF AGRICULTURE

SUPERVISORY OR MANAGERIAL PROBATIONARY PERIOD REPORT

IMPORTANT
THIS FORM IS DUE BACK TO THE PERSONNEL OFFICE NO LATER THAN:

1 SOCIAL SEC. NO.	2 NAME (Last, First, Middle)	3 PROBATIONARY PERIOD SERVED AS (Check One) ☐ Supervisor ☐ Manager ☐ Supervisor/Manager
4 PAY / 5 OCCP. / 6 GRADE	7 SERVICE PERIOD COVERED THIS RPT.	8 OFFICIAL POSITION TITLE
9 AGENCY CODE	10 ORGANIZATIONAL STRUCTURE CODE	11 OFFICIAL DUTY STATION

SEE REVERSE OF FORM BEFORE COMPLETING FOLLOWING ITEMS

12. **FOR COMPLETION BY SUPERVISOR.** IN THE APPROPRIATE RESPONSIBILITIES LISTED BELOW, CHECK WHETHER THE EMPLOYEE'S PERFORMANCE IS SATISFACTORY OR UNSATISFACTORY.

A SUPERVISORY PROBATIONARY PERIOD			B MANAGERIAL PROBATIONARY PERIOD		
SATIS-FAC-TORY	UNSAT-ISFAC-TORY	RESPONSIBILITIES	SATIS-FAC-TORY	UNSAT-ISFAC-TORY	RESPONSIBILITIES
		1 Assigns, directs, and evaluates subordinates work			1 Determines and sets programs' goals
		2 Organizes and utilizes staff resources effectively			2 Formulates, determines, and/or influences agency policy
		3 Accomplishes work objectives			3 Effectively determines and allocates resource needs
		4 Identifies and meets development needs of subordinates			4 Organizes and directs work
		5 Recognizes and performs employee counseling			5 Accomplishes organizational affirmative action objectives
		6 Maintains effective organizational climate			6 Evaluates program effectiveness
		7 Adheres to agency and USDA rules and regulations			
		8 Accomplishes affirmative action objectives			

13 I CERTIFY THAT THE EMPLOYEE HAS COMPLETED THE REQUIRED 80 HOURS OF SUPERVISORY/MANAGERIAL TRAINING.
☐ Yes ☐ No

14 A ☐ I RECOMMEND THAT THE EMPLOYEE BE RETAINED IN SUPERVISORY OR MANAGERIAL POSITION.

14 B ☐ I RECOMMEND THAT THE EMPLOYEE BE RETURNED TO NONSUPERVISORY OR NONMANAGERIAL POSITION.

15 SUPPORTING REASONS FOR NOT RETAINING EMPLOYEE IN SUPERVISORY OR MANAGERIAL POSITION (Narrative)

16 SUPERVISOR'S SIGNATURE		19 REVIEWING OFFICIAL'S SIGNATURE	
17 TITLE	18 DATE	20 TITLE	21 DATE

EMPLOYEE'S COPY

FORM AD – 773 (5/80)

Figure 76: Supervisory or Managerial Probationary Period Report

TAPER and Status Quo Employees Approaching Eligibility for Conversion to Career

Report Number	AECO37T6

Report Number	AECO37T6
Brief Description	Provides a list by pay period of Temporary Appointment Pending Establishment of a Register (TAPER) and status quo employees approaching eligibility for conversion to career positions. A TAPER employee is employed under an OPM authority granted to an Agency when there are insufficient eligibles on a register to fill a position. A status when his/her position was placed in the competitive service by a statute, Executive Order, or Civil Service Rule which permitted retention without acquiring such status. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, TAPER and Status Quo Employees Approaching Eligibility for Conversion to Career.

PREPARED XX/XX/XX AECO37T6 TAPER AND STATUS QUO EMPLOYEES APPROACHING ELIGIBILITY PAGE 1
FOR CONVERSION TO CAREER – AS OF XX/XX/XX

AG 11 11 FOREST SERVICE EMP OFF 5130 ROSEBURG, OR

EMPLOYEE NAME	SOCIAL SECURITY NUMBER	ORG. STRUCTURE 2 3 4	TYPE APPT	BEGINNING DATE TOWARD CAREER	TYPE EMP	EXCESS AWOP	INT DAYS	F/T P/T DAYS	DUTY STATION ST CITY CTY	PAY PLAN	GRADE	STATUS QUO
DOE, JOHN R	XXX-XX-XXXX	06 0002 15	03	XX/XX/XX	INT	0000	000	000	41 2075 019	GS	03 03	0

EMPLOYING OFFICE TOTAL 1

Figure 77: TAPER and Status Quo Employees Approaching Eligibility for Conversion to Career

Temporary Employees - FEHB Coverage Eligibility

Report Number	AECO37U4
Brief Description	Provides the date that certain temporary employees will become eligible to participate in FEHB. It is produced two pay periods in advance of the FEHB eligibility pay period. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Temporary Employees - FEHB Coverage Eligibility.

PREPARED XX/XX/XX AECO37U4 TEMPORARY EMPLOYEES – FEHB COVERAGE ELIGIBILITY – AS OF XX/XX/XX PAGE 1

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

AG 03 03 AGRICULTURAL RESEARCH SERVICE PERS. OFF. ID. 4860 BELTSVILLE, MD

EMPLOYEE NAME / SOC SEC NO	ORG. STRUCT 2 3 4	TYPE APPT	TYPE EMPLOY	DATE ELIGIBLE	DUTY STATION CITY/STATE / D.S. CODES		PAY PLAN	GRADE/ STEP	OCC SERIES	FEHB TEMP SCD
DOE, JANE R					DURANT	OK				
XXX-XX-XXXX	60 62 6220	09	INT	XX/XX/XX	40 1430 013		GS	02 01	1311	XX/XX/XX
DOE, JOHN L					WESTCHESTER	OK				
XXX-XX-XXXX	60 62 6220	09	INT	XX/XX/XX	40 0456 037		GS	05 03	1311	XX/XX/XX
DOE, JOHN R					BELTSVILLE	MD				
XXX-XX-XXXX	60 62 6220	04	P/T	XX/XX/XX	24 0100 033		GW	04 01	0318	XX/XX/XX

STRUCTURE LEVEL 60 62 6220 TOTAL 3

Figure 78: Temporary Employees - FEHB Coverage Eligibility

Total Wage Employee Population

Report Number	BEAR9003
Brief Number	Provides the total number of wage employees in each county. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

REPORT # BEAR9003		U.S. DEPARTMENT OF AGRICULTURE				PAGE 2
AS OF JULY XXXX		TOTAL WAGE EMPLOYEE POPULATION				
		FOREST SERVICE				11 PREPARED XX/XX/XX
		DENVER			0802	
STATE	CITY / COUNTY	PAY PLAN-SERIES-GRADE-BARGAINING UNIT			TOTAL	
	2269-SHAWNEE 093-PARK					
		WG 5001	05	7777	1	
		WG 5001	07	7777	1	
	2269-SHAWNEE 093-PARK				2	
	2305-SILVERTHORNE 117-SUMMIT					
		WG 4742	07	0634	1	
	2305-SILVERTHORNE 117-SUMMIT				1	
CO	TOTAL				15	
FWS AREA TOTAL					15	

Figure 79: Total Wage Employee Population

Vacancy Review Notice

Report Number	AECO4604 (PMS 1)
Brief Description	Provides notification to management the position vacated within the last 2 weeks and the staffing options available. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, Vacancy Review Notice.

PREPARED XX/XX/XX AECO4604 (PMS 1) VACANCY REVIEW NOTICE – AS OF XX/XX/XX PAGE

AG 03 03 AGRICULTURAL RESEARCH SERVICE SON 4660 WASHINGTON, DC

POSITION ORGANIZATIONAL STRUCTURE	MASTER RECORD NUMBER	POSITION NUMBER	POSITION OFFICIAL TITLE	PAY PLAN	OCCUPATIONAL SERIES	GRADE LEVEL
86 91 76 0760 10 00 00 00	H00F11	RTC00002	AUDITOR	GG	0611 00	07

* * * * * THIS POSITION WAS VACATED XX/XX/XX * * * * *

YOUR STAFFING OPTIONS ARE :

PLEASE CONTACT YOUR PERSONNEL SPECIALIST IF YOUR INTENTION IS TO :

FILL AS DESCRIBED	________	CHANGE TITLE AND SERIES	________	REASSIGNMENT	________
FILL AT LOWER GRADE	________	INACTIVE POSITION	________	OPM CERTIFICATE	________
FILL AT HIGHER GRADE	________	ABOLISH POSITION	________	VACANCY ANNOUNCEMENT	________
				REINSTATEMENT	________
				SPECIAL PROGRAM	________
				CORRECT A MISCLASSIFICATION	________

IF YOU HAVE DECIDED TO FILL THIS VACANCY, ATTACH AN SF-52

SIGNATURE

____

Figure 80: Vacancy Review Notice

W2 Reporting System Earnings by Duty Station and Residence for Kansas and Missouri

Report Number	WTWO00102
Brief Description	Provides a list of employee's earnings by duty station of work performed and residence in the States of Kansas and Missouri. This report contains sensitive data and its use is restricted. This report is produced annually (fiscal year) and is available as a hard copy or by electronic transmission. It is distributed by contact point number.

```
REPORT NO. WTW00102                    USDA-OFM-NFC                              PAGE:      3
DATE PREPARED XX/XX/XX              W2 REPORTING SYSTEM
TIME PREPARED 06: 45 AM    EARNINGS BY DUTY STATION AND RESIDENCE
                               FOR KANSAS AND MISSOURI
                   ** SENSITIVE PERSONNEL DATA - USE IS RESTRICTED **

TA CONTACT: XX-20-2899-17-00                                SSNO: XXX-XX-XXXX   TAX YEAR: 20XX

JOHN E. DOE                                TAXABLE TRVL    0.00
842 ANY STREET                              NO TAX TRVL    0.00
SOMEWHERE          KS 000000000                    COLA    0.00
                                             ALLOWANCES    0.00

DUTY STATION EARNINGS:
STATE COUNTY             CITY                        GROSS AMOUNT
  KS   ANYWHERE          ANYTOWN                         13,000.65

                              TOTAL                13,000.65

RESIDENCE EARNINGS:
STATE COUNTY             CITY                        GROSS AMOUNT
  KS   ANYCOUNTY         ANYCITY                         13,000.65

                              TOTAL                13,000 65
```

Figure 81: W2 Reporting System Earnings by Duty Station and Residence for Kansas and Missouri

Wage And Tax Statement

Form Number	Form W-2
Brief Description	Provides annual wage and tax information for an employee. This report contains sensitive data and its use is restricted. This report is produced annually (calendar year) and is available as a hard copy. This report is also available to the Agency through RPCT and to the employee through EPP.

EMPLOYER'S NAME, ADDRESS AND ZIP CODE U.S DEPARTMENT OF AGRICULTURE NATIONAL FINANCE CENTER P.O. BOX 60000 NEW ORLEANS, LA 70160		EMPLOYEE'S NAME, ADDRESS AND ZIP CODE DOE, JOHN R 9122 LAKE ROAD NEW ORLEANS, LA 70000		1 Wages, tips, other compensation 30,733.86		2 Federal income tax withheld 6,061.18
				3 Social security wages 33,047.20		4 Social security tax withheld 600 09
EMPLOYER'S ID 72-0584834F		EMPLOYEE'S SSN 123-45-6789		5 Medicare wages and tips 33,047.20		6 Medicare tax withheld 421 51
8 Allocated tips	10 Dependent care benefits	12 Benefits included in Box 1	13D. 401K TSP 2,313.34	13P. XX Moving Allow. NT	14B. NT Health benefits	14D. XX Moving allow. NT
9 Advance EIC payment		13C. Taxable life insurance	13E. 403B TIAA	14A. XX Moving allow. taxed	14C. COLA	14E. XX Moving allow. taxed
16 State LOUISIANA	Employer's State ID No. 1369123001	18 State income tax 429.51	19 Name of locality		Locality ID No.	21 Local income tax
Department of the Treasury–Internal Revenue Service FORM W-2 Wage and Tax Statement 20XX		Copy B - To be filed with employee's FEDERAL tax return		OMB No. 1545-0008 90-22-1688-30-91		< Delivery Point

Figure 82: Wage And Tax Statement

Wage Employees Error Listing

Report Number	BEAR9004
Brief Description	Provides a list of wage grade employees and the specific error condition for each POI. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by Agency.

SENSITIVE PERSONNEL DATA USE IS RESTRICTED

REPORT # BEAR9004 — UNITED STATES DEPARTMENT OF AGRICULTURE — PAGE 2
DATE PREPARED — NATIONAL FINANCE CENTER — PAY PERIOD XX
XX/XX/XX — WAGE EMPLOYEES ERROR LISTING

** SENSITIVE PERSONNEL DATA – USE IS RESTRICTED **

SOCIAL SECURITY NUMBER	EMPLOYEE NAME	WAGE CODE	DUTY STATION CODES	AGY	EMP OFF	TABLE–29 RATE	PAY PLAN	GRADE	STEP	TOE	PAY RT–DET	WGI DUE	ERROR CONDITION
XXXXXXXXX	DOE	1904	19 0230 169	03	4860	15 52	WS	04	02	1	0	0	SALARY > TABLE 29 SALARY WAS 15 55

Figure 83: Wage Employees Error Listing

Within-Grade Increase Record

Form Number	AD-658
Brief Description	Provides 16 weeks advance notice that the employee will complete the waiting period required for within-grade salary increase. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy. It is distributed by POI. This report is also available through RFQS, WIthin-Grade Increase Record.

U.S. DEPARTMENT OF AGRICULTURE
WITHIN–GRADE INCREASE RECORD

PART I

1. NAME *(Last, first, middle)*	2. SOCIAL SECURITY NO.	3. AGENCY CODE	4. PAY PLAN	14. WGI WAITING PERIOD BEGAN
5. OCCUP. SER. / 6. GRADE/STEP / 7. PAY RATE DETER–MINANT CODE	8. SALARY	9. DUTY STATION CODE		15. INT. DAYS IN PAY STATUS NO. DAYS AS OF (DATE)
10. OFFICIAL TITLE OF POSITION	11. PERS. POSITION NO.	12. STANDARD JOB NO.		16. EFF. DATE FOR WGI
13. ORGANIZATION STRUCTURE CODE				17. WGI GRANTED ☐ YES ☐ NO

INSTRUCTIONS: The above employee will meet the time requirements for a WGI on the date shown in Block 16. Final eligi– bility for the WGI depends upon your determination as the employee's supervisor that the employee's performance is at an "acceptable level of competence." Please make sure that you keep a record of any discussions you hold with the employee on this WGI determination. This record will be important should the employee request reconsideration if the within–grade increase is withheld.

LEVEL OF COMPETENCE DETERMINATION FOR WITHIN–GRADE INCREASE

PART II – To be completed, when applicable, by the employee's immediate supervisor not earlier than 2 weeks prior to the effective date.

☐ AN ACCEPTABLE LEVEL OF COMPETENCE. I personally have considered the work of the above–named em- ployee in terms of the essential work factors of the position occupied, and I certify that I find the employee's work to be of an acceptable level of competence within the meaning of 5 U.S.C. 5335.

SIGNATURE AND TITLE OF SUPERVISOR — DATE

PART III – To be completed, when applicable, by the employee's immediate supervisor and the Reviewing Official.

☐ NOT AN ACCEPTABLE LEVEL OF COMPETENCE. (Contact Personnel Office.) I personally have considered the work of the above–named employee in terms of the essential work factors of the position occupied, and I certify that it is not of an acceptable level of competence to establish eligibility for a within–grade increase under 5 U.S.C. 5335.

SIGNATURE AND TITLE OF SUPERVISOR — DATE

☐ I have discussed fully the work of this employee with the supervisor whose signature appears above, and con- cur with the determination made.

SIGNATURE AND TITLE OF REVIEWING OFFICIAL — DATE

RECONSIDERATION FINDINGS

PART IV – To be completed by an appropriate Agency Official should the employee request reconsideration.

☐ The employee's performance during the specified waiting period met the acceptable level of competence re– quirement. The initial decision to withhold is hereby reversed. The within–grade pay increase should be ef– fected on the original due date.

☐ The initial findings are sustained. The employee does not meet the acceptable level of competence require– ment. Employee has been notified.

SIGNATURE AND TITLE OF REVIEWING OFFICIAL — DATE

ORIGINAL – NFC PROCESSING COPY Form AD–658P (12/81)

Figure 84: Within-Grade Increase Record

Work Years and Personnel Cost Report - Basic and Premium Work Years and Pay

Report Number	OPM1351-A
Brief Description	Provides a list by code of staff-years and related costs in thousands for basic and premium work years and payroll. This report is produced annually (fiscal year) and is available as a hard copy or by electronic transmission. It is distributed by Department and Agency.

WORK YEARS AND PERSONNEL COSTS REPORT
BASIC AND PREMIUM WORK YEARS AND PAY
FISCAL YEAR

1. Agency Name	2. Agency Code
3. Pay System Category	4. Pay System Code

CODE	ITEM	OMB OBJECT CLASS	WORK YEARS Two decimal places	PERSONNEL COMPENSATION (Thousands)
100	**Total Basic Work Years and Payroll**	11.1/11.3		
101	Full-Time Permanent Appointments	11.1		
102	Full-Time Temporary Appointments	11.3		
103	Part-Time and Intermittent Appointments (Full-Time Equivalent (FTE))	11.3		
200	**Total Premium Work Years and Pay**	11.5		
201	Overtime Pay (Report separately for the 5 categories listed below.)	11.5	XXXXXXXXXX	XXXXXXXXXXXXXXXXXXXXXXXXX
	- Availability pay for criminal investigators	11.5		
	- Overtime pay for firefighters	11.5		
	- Annual premium pay for regularly scheduled standby duty	11.5		
	- Administratively uncontrollable overtime pay	11.5		
	- Other Overtime pay	11.5		
202	Holiday Pay	11.5		
203	Sunday Pay	11.5	XXX	
204	Night Differential	11.5	XXX	
205	Hazardous Duty Pay	11.5	XXX	
206	Post Differential	11.5	XXX	
207	Staffing Differential	11.5	XXX	XXX
208	Supervisory Differential	11.5	XXX	
209	Physicians Comparability Allowance	11.5	XXX	
210	Remote Work Site Allowance	11.5	XXX	
211	Cash Awards	11.5	XXX	
212	Other*	11.5	XXX	

* Identify separately any forms of premium pay included in code 212 that are equal to 100 thousand dollars or more.

OPM Form 1351-A (Rev. 11/97)

Figure 85: Work Years and Personnel Cost Report - Basic and Premium Work Years and Pay

Work Years and Personnel Cost Report - Cost of Employees Benefits

Report Number	OPM1351-B
Brief Description	Provides a list of the total costs of personnel benefits and related percent of total pay costs. This report is produced annually (fiscal year) and is available as a hard copy or by electronic transmission. It is distributed by Department and Agency.

WORK YEARS AND PERSONNEL COSTS REPORT
COST OF EMPLOYEES BENEFITS
FISCAL YEAR

1. Agency Name			2. Agency Code	
CODE	ITEM	OMB OBJECT CLASS	COST (Thousands)	For Agency Edit Check: COST AS PERCENT OF BASIC PAYROLL
300	**Total Cost of Benefits**	12.1		
301	Health Insurance	12.1		
	- Federal Employees Health Benefits Act			
	- Other			
302	Life Insurance – Federal Employees Group Life Insurance (FEGLI)	12.1		
303	Retirement	12.1		
304	- Civil Service Retirement System (CSRS)	12.1		
305	- Federal Employees Retirement System (FERS) Basic Benefit	12.1		
306	- Federal Employees Thrift Plan (FERS)	12.1		
307	- Other Retirement Systems (specify)	12.1		
308	Federal Insurance Contributions Act Taxes (OASDHI)	12.1		
309	Federal Employees Compensation Act (FECA) Payments to Department of Labor	12.1		
310	Uniform Allowances	12.1		
311	Overseas Allowances (including overseas cost of living allowance (COLA))	12.1		
312	Non-Foreign COLA	12.1		
313	Retention Allowance	12.1		
314	Recruitment Bonus	12.1		
315	Relocation Bonus	12.1		
316	Other Benefits included in Object Class 12.1	12.1		
400	Total Separation Pay (includes severance pay and separation incentive)	13.0		
	- Severance Pay			
	- Separation Incentive (i.e., "Buyout Bonus")			
	Total Benefits Plus Separation Pay (Sum of Codes 300 and 400)	12.1 & 13.0		

OPM Form 1351-B (Rev. 11/97)

Figure 86: Work Years and Personnel Cost Report - Cost of Employees Benefits

Work Years and Personnel Cost Report - Leave Earned and Used

Report Number	OPM1351-C
Brief Description	Provides a list of various types of leave earned and used during the leave year. This report is produced annually (leave year) and is available as a hard copy or by electronic transmission. It is distributed by Department and Agency.

WORK YEARS AND PERSONNEL COSTS REPORT
LEAVE EARNED AND USED
LEAVE YEAR

1. Agency Name

2. Agency Code

Type of Leave	Leave Used		Number of Leave Days:			Credited For Retirement
	Number of Days	Value (Thousands)	Earned	Carried Over End of Year	Forfeited End of Year	
1. Total Annual	(1)	(1)				XX
1a. Annual Lump-Sum Payments (separately)	(2)	(2)	XX	XX	XX	XX
2. Sick					XX	
3. Holidays			XX	XX	XX	XX
4. Time-Off Awards			XX	XX	XX	XX
5. Other Leave for Employees Covered by 5 U.S.C. 6301			XX	XX	XX	XX
6. Other Leave[3] for Employees not Covered by 5 U.S.C. 6301						

[1] Includes lump-sum payments for annual leave paid to separating employees.
[2] Lump-sum payments shown separately.
[3] Leave granted to employees not covered by chapter 63 of title 5, U.S. Code, regardless of type of leave. Specify categories of employees for whom this type of leave is reported.

OPM Form 1351-C (Rev. 11/97)

Figure 87: Work Years and Personnel Cost Report - Leave Earned and Used

Your Personal Benefits Statement

> This topic has been updated to replace the 2018 Personal Benefits Statement with the 2019 Personal Benefits Statement, to add Federal Deposit Insurance Corporation (FDIC) employees in Pay Plan EX to the list of employees who will not receive a Personal Benefits Statement, and to update the Thrift Saving Program (TSP) Annuity Interest Rate Index to 1.750%.

Your Personal Benefits Statement provides the estimated value of benefits available to an employee or his/her survivors in the event of voluntary retirement, disability retirement, or death. The statement also includes estimated annuity benefits and account balances from TSP, Social Security (OASDI (Old Age and Survivors Disability Insurance)) and/or Medicare (HIT (Hospital Insurance Tax)) benefits.

The Personal Benefits Statement is produced annually (calendar year) and is available to the Agency through the Reporting Center (RPCT) and to the employee through the Employee Personal Page (EPP). Below is an example of a Personal Benefits Statement for a Federal Employees Retirement System (FERS) employee.

FERS

YOUR PERSONAL BENEFITS STATEMENT
BASED ON YOUR ACCOUNT AS OF JANUARY 5, 2020

Social Security Number	
Birth Date	
Retirement SCD	
Retirement Coverage	
6C/ECBPO Retirement SCD	
Leave SCD	
TSP Contribution Amount Regular:	Roth:
TSP Catch-up Contribution Amount Regular:	Roth:

As an employee of the Federal Government, your total compensation consists of more than just the amount you are paid-it also includes your benefits package. This statement has been prepared to inform you about your benefits coverages and costs. It is provided annually and is not available on request. If you have questions concerning this statement, or if you believe it does not accurately reflect your benefits coverages, please contact the appropriate office or individual as designated by your employing organization. Annual deduction amounts shown throughout this document are the total amounts paid for the prior calendar year (pay period 01 through 26).

Benefits amounts shown in this document are estimates. If you are considering retirement, please seek more precise information from your employing organization.

Pay

The annual pay used to prepare this statement is . Unless otherwise indicated, this is your base pay as of 1/5/20 (including pay for holidays and leave). Base pay is the amount on which your benefit deductions and coverages are based. Generally, it does not include overtime; however, it does include locality pay; environmental pay; AUO and availability pay for law enforcement officers; standby pay for firefighters, some law enforcement officers and other employees; and inspectional overtime (COPRA) for Customs and Border Protection Officers; and, overtime supplement (BPAPRA) for Border Patrol Agents.

Total Compensation And Costs

Your total compensation (pay and benefits) for calendar year 2019 was . Total compensation costs to you and the Government are shown throughout this statement This includes only costs paid by your present employing agency. If you were not employed for the full calendar year or if you transferred from another agency during the year, costs paid may not be shown or may not reflect actual amounts.

Leave

Sick Leave

If you are unable to work because of illness or injury, your accumulated sick leave is available for use. Your full pay continues for the period of your accumulated sick leave. As of 1/4/20 you had hours of accumulated sick leave. You may use annual leave in place of, or as an extension of, sick leave.

Annual Leave

Your annual leave balance as of 1/4/20 is hours.

Federal Employees Health Benefits (FEHB) Program

You are covered by:

Premium conversion is a tax benefit that allows employees to allot a portion of salary back to the employer, which the employer then uses to pay the employee's contribution for FEHB coverage. This allotment is made on a pre-tax basis, which means that the money is not subject to Medicare, Social Security, or Federal income taxes.

Premium Costs

	2020 Bi-Weekly	2019 Annual
Employee		
Agency		
Total		

To continue health insurance coverage in retirement you must retire on an immediate annuity and have been covered for the 5 years immediately before retirement, or since your first opportunity to enroll, if fewer than 5 years. (These coverage requirements also apply if you receive FECA benefits.) Coverage for your enrolled dependents may continue if they are eligible for either CSRS or FECA benefits. Should your dependents lose their status as family members, their participation in FEHB may continue for a limited period of time under provisions for Temporary Continuation of Coverage (TCC). The affected individual may also choose to convert coverage to a nongroup contract.

Your FEHB Contributions are Tax Deferred.

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Figure 88: Example of Page 1 of a FERS Personal Benefits Statement

Federal Employees Group Life Insurance (FEGLI) Program

Coverage:

Premium Costs	2020 Bi-Weekly			2019 Annual		
	Employee	**Agency**	**Total**	**Employee**	**Agency**	**Total**
Basic						
Standard - Option A						
Additional - Option B						
Family - Option C						
Total						

Coverage Amounts	Basic	Standard	Additional	Total
If Death Is Not Accidental				
If Death Is Accidental				

Family Option
Death of Spouse
Death of Child

Accidental Dismemberment
Loss of Limbs or Total Eyesight
Loss of One Limb or One Eye

Your basic life insurance is increased by an "extra benefit" for participants under age 45. This benefit doubles the amount of basic life insurance if you are age 35 or younger. Beginning on your 36th birthday, the extra benefit decreases 10% each year until, at age 45, there is no extra benefit.

Family Optional Life Insurance
If a covered family member dies while you are working, you would receive the above benefit. If you should die while working, insured family members may convert their own coverage to individual policies. If you have a life event, such as marriage, the adoption of a child, divorce, etc., you may be eligible to elect more life insurance coverage. For further information, contact the appropriate office or individual as designated by your employing organization.

Coverage in Retirement after Age 65
To be eligible for life insurance coverage during retirement (including FECA benefits), you must retire on an immediate annuity and be enrolled for the 5 years immediately before retirement or since your first opportunity to enroll. If you are eligible to continue life insurance coverage during retirement,

- decide upon the level of coverage you wish to retain.
- elect to keep all or some of your Basic life insurance.
- elect to keep all or some of your Family coverage in excess of one multiple first elected as a result of changes to the FEGLI law in 1999/2000.
- premiums for Basic and Family are based on the amount on insurance retained.

Basic
No Reduction. Retain full value for life; after age 65, regular premium stops, you pay only the premium for retaining full value.

50% Reduction. Retain full value until age 65; at age 65, value decreases 1% per month until 50% of the face value at retirement remains; premiums continue for life. After age 65, the regular premium stops, you pay only the premium of retaining 50% of the value.

75% Reduction. Retain full value until age 65; premiums at the active employee rate continue until age 65 at which time they stop; value reduces 2% per month until 25% of the face value at the time of retirement remains.

Standard
Premiums continue until age 65 when they cease; the value of the insurance reduces 2% per month until 25% ($2,500) remains.

Additional and/or Family
If you are eligible to continue these options during retirement, you must decide upon the level of coverage you wish to retain. Your options are:

- choose to retain all of your coverage based on the number of multiples you wish to retain beyond age 65; premiums are based on age bands and the amount of insurance retained; or
- choose a total reduction in the value of your coverage; premiums continue until age 65 when they stop; the value of insurance reduces 2% per month until coverage ends.

Employees may also irrevocably assign their life insurance or elect a living benefit, if eligible. For further information, contact the appropriate office or individual as designated by your employing organization

Thrift Savings Plan (TSP)

TSP Contributions	2020 Bi-Weekly	2019 Annual	2020 Roth Bi-Weekly	2019 Roth Annual
Employee				
Agency				
Catch-up				
Total				

As of December 31, 2019, your TSP account balance was including a Roth balance of .
Your account balance will become available when you separate from the Federal Government. When you withdraw your TSP account you can: (1) receive a lump sum payment, (2) get equal payments over a number of years, (3) roll it over into an IRA, or (4) buy an annuity.

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Figure 89: Example of Page 2 of a FERS Personal Benefits Statement

TSP Contributions (continued)

Assuming you continue TSP contributions at the same rate, and earnings on your account average 7% per year, your estimated TSP account balance when you are first eligible to retire would be . The estimated annuity shown in the next column presupposes the following conditions: you and your spouse are the same age; you select the 100% survivor annuity; and the interest rate index on the level payment annuity, with no cash refund, when purchased, will be **1.750%**. An estimated TSP account balance at the time of retirement will not be calculated for any employee who wasn't contributing to your account as of December 31, 2019.

Should you die while employed, your TSP funds become available to the individuals named on your Designation of Beneficiary, TSP-3, or according to the order of precedence. If you need further information, please contact the appropriate office or individual as designated by your employing organization.

TSP Estimated Monthly Annuity

If You Retire At Age	Single Life Annuity	Joint Life (Spouse) Annuity

Benefits Under The Federal Employees Retirement System (FERS)

Retirement Coverage Costs

	2020 Bi-Weekly	2019 Annual
Employee		
Agency		
Total		

FERS bases annuity computations on a formula using length of service and an average of the highest 3 consecutive years of basic pay (High-3). If you are not eligible to retire in the next 3 years, your annual salary as of the date of this statement has been used as your High-3 average pay for the estimates below. If you are eligible to retire within the next 3 years, the estimates below were prepared using a High-3 based on information in the payroll system. If less than 3 years of pay data were available, reasonable assumptions regarding your pay history have been made. Length of service was determined by using your retirement service computation date. In addition all annuity estimates are shown in gross dollar figures.

The estimates shown below do not include:

- accumulated sick leave or reductions for unpaid deposits or redeposits;
- additional annuity for payments to the voluntary contributions program;
- exact application of post April 7, 1986, part-time service requirements because stored system data related to salary begins only with January 1993, and complete tour of duty proration is not available. Contact your servicing personnel office for complete calculation;
- credit for temporary service performed after 1988 for FERS employees.

Actual retirement benefits will be based on your total creditable service and your "High-3" average pay as determined by the Office of Personnel Management when you retire. For this computation, your "High-3" is . Your length of service at age will be years.

Optional Retirement Estimated Monthly Annuity

If You Retire At Age	Annuity With No Survivor Benefit	Annuity Reduced For Survivor Benefit	Survivor Benefit

You may also be eligible for the Special Supplement until age 62. The Special Supplement is an approximation of Social Security benefits earned while under FERS. The Special Supplement is subject to the Social Security earnings test and is not reflected in these estimates.

You may also retire at your minimum retirement age (55 to 57, depending on your birthday) with 10 years of service. However, your annuity will be reduced by 5% for each year you are under age 62, and you will not receive the special supplement mentioned above.

Disability Benefits

If you have 18 months or more of Federal civilian service and become disabled for your position, you may be eligible for disability retirement. FERS disability annuities are computed in different ways depending on the annuitant's age and service at the time of retirement. In most cases, benefits are recomputed after the first 12 months and again at age 62. Persons who transferred to FERS, and who are eligible for a CSRS component in their FERS annuity, will receive the higher of the FERS computation or their earned annuity. Based on a "High-3" of during the first year of retirement, your estimated monthly annuity, without survivor benefits, under FERS would be about . Subsequent years will be less. A disability annuity begins the day after separation or pay ceases, and continues while you remain disabled, even for life.

If you are also entitled to disability benefits from the Social Security Administration, your FERS disability annuity will be reduced by the Social Security pension. Social Security disability benefits would be replaced by old age benefits at age years and months.

Death In Service

If you die as an employee, survivor benefits may be payable to your spouse if you have at least 18 months of civilian service and have been married at least 9 months, have a child born of that marriage, or die of accidental causes. The Basic Employee Death Benefit is:

- one-half of basic pay at the time of death (or one-half of High-3, if greater than basic pay), plus
- an additional amount

If you have accrued 10 years of service, your spouse may also be eligible for an annuity that is 50% of that which you would have received had you been eligible for retirement on the date of death. Your surviving spouse's estimated monthly annuity would be payable for life, unless remarried before age 55. Eligible children-generally unmarried children under age 18, or under age 22 if full-time students-may also qualify for benefits. Children's benefits are reduced by the child's Social Security survivor benefits.

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Figure 90: Example of Page 3 of a FERS Personal Benefits Statement

Social Security Benefits/Medicare Benefits

Social Security/ Medicare Deductions

	2020 Bi-Weekly		2019 Annual	
	Employee	Agency	Employee	Agency
Social Security (OASDI)				
Medicare (HIT)				
Total				

As an employee covered by the Federal Insurance Contributions Act, you will be eligible for Social Security benefits which are payable monthly as early as age 62. Benefits will also be available to current spouse, eligible former spouse(s) and eligible children. These benefits will be based on your entire work history. Estimated benefits can be obtained from the Social Security Administration by submitting Form SSA-7004, Request for Earnings and Benefit Statement. A copy of the form can be obtained by calling the toll-free number 1-800-772-1213 or contacting your local Social Security office.

Hospital Insurance Tax (HIT)/Medicare Coverage

There are two parts to Medicare:

- **Hospital insurance (Part "A")**
  This helps pay for inpatient hospital care and certain follow-up services; and
- **Medical insurance (Part "B")**
  This helps pay for doctors' services, outpatient hospital care, and other medical services.

Eligibility For Hospital Insurance (Part A)

Most people get hospital insurance when they turn 65. You qualify for it automatically if you:

- are eligible for Social Security or Railroad Retirement benefits;
- qualify on a spouse's (including divorced spouse's) record;
- are a government employee not covered by Social Security who paid the Medicare part of the Social Security tax;
- have been getting Social Security disability benefits for 24 months;
- have permanent kidney failure that requires maintenance dialysis or a kidney replacement provided you are insured or if you are the spouse or child of an insured worker.

If you paid hospital insurance taxes (HIT) while you worked, Part A is free when you are eligible for it. If you do not qualify based on one of the above reasons and you are 65 or older, you can buy hospital insurance just like you buy other health insurance policies.

Medical Insurance (Part B)

Almost anyone who is eligible for hospital insurance can sign up for medical insurance. Unlike Part A, Part B is an optional program. However, you do have to pay for it.

Benefits Under The Federal Employees Compensation Act (FECA)

Disability

If you experience an on-the-job injury, you may be entitled to benefits under the Federal Employees Compensation Act which is administered by the Department of Labor's Office of Workers Compensation Programs (OWCP). You may be eligible to receive full pay for up to 45 days. Benefits start after a 3-day waiting period, except when the disability lasts more than 14 days or permanent disability results. In those cases, benefits begin as of the day you became disabled. If you qualify for both FERS and FECA benefits, you may choose the more advantageous.

Death Benefits

If death results from an on-the-job injury, your eligible spouse and/or dependent children may receive a lump sum payment of up to $1,000. Spousal benefits are payable for life, or until remarried if before age 55. A spouse who remarries before age 55, receives a lump sum payment equal to 24 months' benefits. Children's benefits continue as long as they qualify as dependents. If your survivors are eligible for benefits under both FERS and FECA, they may choose whichever is more advantageous.

If You Leave The Federal Government Before You Retire

FERS Contributions

You may leave your retirement contributions in FERS. If you have at least 5 years of service covered by contributions, but less than 10, you may apply for a deferred annuity at age 62. If you have at least 10 years of service covered by contributions, you may apply for retirement at the Minimum Retirement Age (MRA), which is based on your date of birth. If you are younger than age 62 when you begin to receive benefits, depending on your age and length of service, your benefits may be reduced. You may also apply for a refund of your retirement contributions. If you do so, however, and are reemployed by the Federal government, you will not be eligible to receive benefits based on service covered by the refund. Individuals who are subsequently reemployed can make a redeposit of the amount refunded, plus interest, and to have credit for the service reinstated. For the purposes of survivor annuities, redeposit may also be made by survivors.

Health Insurance

Should you leave the Federal Government, you may continue group coverage for up to 18 months under the rules for Temporary Continuation of Coverage (TCC), or you may choose to convert to your plan's nongroup contract. If you elect TCC, you must pay the employee and government shares of the premium, plus a 2% administrative fee. If you elect to convert to an individual plan, the plan will notify you of the premiums and benefits coverages. If you need more information, contact the appropriate office or individual, as designated by your employing organization.

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Figure 91: Example of Page 4 of a FERS Personal Benefits Statement

If You Leave The Federal Government Before You Retire (continued)

Life Insurance
If you are enrolled in life insurance when you leave the Federal Government, you and your covered dependents have the option of obtaining a direct-pay life insurance policy without a physical examination. Contact the appropriate office or individual, as designated by your employing organization if you need more information.

Thrift Savings Plan
If your TSP account has less than $200, the Federal Retirement Thrift Investment Board will automatically send you the balance of your account in a lump sum payment. Additional withdrawal options include receiving a partial payment, monthly payment, mixed withdrawal or rolling the balance over to an Individual Retirement Account. Visit the TSP website at www.tsp.gov for more information.

Annual Leave
Should you separate from the Federal Government for any reason, you would be paid any accumulated annual leave, subject to offset for any debts you may owe the United States. Based on your annual leave balance as of 1/4/20 which was hours, your annual leave would be worth .

Sick Leave
Should you separate from the Federal Government other than retirement, you will not be paid for your accumulated sick leave. However, if you are reemployed in the Federal Government on or after December 2, 1994, your sick leave balance will be recredited to your leave account.

Other Benefits

Other Benefits include any or all of the following: Federal Long Term Care Insurance Program (FLTCIP), Flexible Spending Account (FSA), and the Federal Dental/Vision Insurance Program (FEDVIP).

For information on eligibility and the web links to enroll, visit OPM's Benefits webpage at http://www.opm.gov/insure.

Long Term Care Insurance Payroll Deduction No

		2020 Bi-Weekly
Dental		
Vision		
Flexible Spending - Healthcare		
Flexible Spending - Dependent Care		

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Figure 92: Example of Page 5 of a FERS Personal Benefits Statement

Who Will Receive the Statement

The purpose of the annual statement is to provide information about the employee's complete compensation package and to serve as a tool for the employee in developing a financial plan for his/her retirement. A statement that is applicable to his/her retirement coverage is produced for each eligible employee in the following retirement plans:

Retirement Coverage Code	Plan Name
C	Civil Service Retirement System (CSRS) Offset
D	CSRS Offset (Congressional) Federal Insurance Contribution Act (FICA)
E	FICA and CSRS - Special (Partial)

Retirement Coverage Code	Plan Name
G	FICA and Foreign Service Retirement and Disability System (FSRDS) (Partial)
I	FERS (Congressional) FICA
IF	Foreign Service Pension System (FSPS) Further Revised Annuity Employees (FRAE) (Congressional)
IR	FERS-RAE (Revised Annuity Employees) (Congressional)
K	FERS and FICA
KF	FERS (FRAE)
KR	FERS-RAE and FICA
M	FERS and FICA - Special
MF	FERS (FRAE) - Special
MR	FERS-RAE and FICA - Special
O	Customs and Border Protection Officers (CBPO) FERS Enhanced
OF	FERS (FRAE) CBPO
OR	FERS-RAE and FICA - Special (CBPO)
P	FSPS and FICA
PF	FSPS (FRAE)
PR	FSPS-RAE and FICA
Q	CBPO CSRS Offset
R	FICA and CSRS (Full)
T	FICA and CSRS - Special (Full) - for law enforcement and firefighter personnel
0	CBPO Enhanced (CSRS)
1	CSRS
3	FSRDS
6	CSRS - Special - for law enforcement and firefighter personnel

Retirement Coverage Code	Plan Name
7	CSRS (Congressional)

Part-time employees with any of the above codes and one of the following work schedules will receive a statement for his/her applicable retirement plan:

Work Schedule Code	Description
P	Part-time
Q	Part-time seasonal
S	Part-time sharer
T	Part-time seasonal job sharer

Some employee benefits statements may consist of less than a full calendar year, due to the Agency's implementation date to NFC's Payroll/Personnel System.

Who Will Not Receive the Benefits Statement

Some employees will not receive the benefits statement for the following reasons:

- The employee's retirement coverage code is not in the above list.
- The employee is intermittent/seasonal (i.e., other than work schedules **P**, **Q**, **S**, and **T**).
- The employee's 6C Retirement Date on IRIS Program IR102, Dates & Misc Sal/Pers Data, is invalid. This date identifies the SCD for employees appointed to law enforcement officers and firefighter (LEO/FF) positions or Customs and Border Protection Officers. These employees are under Retirement Coverage Codes **0**, **6**, **E**, **M**, **O**, **Q**, or **T** and require a special retirement deduction rate. Invalid means that the 6C Retirement Date is earlier than the retirement service computation date or is later than the Benefits Statement date.
- The employee is not eligible for retirement benefits.
- The employee was not active in the last pay period of the prior year or Pay Period (PP) 01 of the current year.
- The employee is an FDIC annuitant with FERS annuitant indicator **A** or **G** or CSRS annuitant indicator **1** or **6**.
- The employee is an FDIC annuitant in Pay Plan EX.
- The employee's Agency has elected not to issue statements. The following Agencies fall under this category:

- Architect of the Capitol (LA)
- Commission on Security and Cooperation in Europe (85)
- Congressional Budget Office (AQ)
- Consumer Financial Protection Bureau (FT)
- Office of the Comptroller of the Currency (AJ)
- Smithsonian Institution (Trust) (71)
- Treasury Technical Assistance (TE)
- U.S. Botanic Garden (BG)
- U.S. Capitol Police (CP)
- U.S. Senate Restaurants (SR)

Description of Each Item

The following provides an explanation of the statement. This is not the final authority, but is written to explain items that are computed for the statement. Most items appear on the statement for all retirement plans with the Personal Statement of Benefits System (PSBS). Some items appear only on selected statements and are clearly stated in the text of the description. All or a combination of the items may appear on your statement depending on your particular Agency's requirements and/or your type of retirement plan.

Descriptions of each item are as follows:

Field	Description
Social Security Number	Displays the employee's masked Social Security number (SSN) as it appears on IRIS Program IR117, Retirement Data. This number is generated from BEAR as of PP 01 of the current year.
Birth Date	Displays the employee’s date of birth as it appears on IRIS Program IR122, SF-50B Data Elements.
Retirement SCD	Displays the employee’s SCD for retirement as it appears on IRIS Program IR102. This date is generated from BEAR as of PP 01 of the current year.
Retirement Coverage	Displays the name and code of the employee’s retirement plan as it appears on IRIS Program IR117. Descriptions can be found on TMGT Table 025, AD-350 (Personnel Block and Description), Block Number 16. This code is generated from BEAR as of PP 01 of the current year.
6C/ECBPO Retirement SCD	Displays the employee’s 6C SCD for retirement as it appears on IRIS Program IR102. This date is used to compute benefits under special LEO/FF service or enhanced CBPOs covered under the Customs Officer Pay Reform Act of 1993 (COPRA) service. This date is generated from BEAR as of PP 01 of the current year. For all other statements, **N/A** is

Field	Description
	displayed. Note: If this date is invalid, incorrect, or missing, the employee will not receive a statement. Invalid means the 6C retirement date is not a valid date, is earlier that the employee's retirement SCD, or is later than the statement date.
Leave SCD	Displays the employee's SCD for leave accrual as it appears on IRIS Program IR102. This date is generated from BEAR as of PP 01 of the current year.
TSP Contribution Amount - Regular	Displays the employee's biweekly contribution to his/her TSP account as it appears on IRIS Program IR118, Thrift Savings Data, for Plan Code `01` (FERS) and Plan Code `02` (CSRS). This amount is displayed either as a dollar amount or percentage rate. This information is generated from BEAR as of PP 01 of the current year.
TSP Contribution Amount - Roth	Displays the employee's biweekly non-tax deferred contribution to his/her TSP account as it appears on IRIS Program, IR118 for Plan Code `98` (FERS) and Plan Code `99` (CSRS). This amount is displayed either as a dollar amount or percentage rate. This information is generated from BEAR as of PP 01 of the current year.
TSP Catch-up Contribution Amount - Regular	Displays the Catch-up Contribution Amount for TSP participants age 50 and older as is appears on IRIS Program IR118 for Plan Code `06` (TSP Catch-up Contribution). This field is displayed as a dollar amount and is generated from BEAR as of PP 01 of the current year.
TSP Catch-up Contribution Amount - Roth	Displays the Roth Catch-up Contribution Amount for TSP participants 50 and older as it appears on IRIS Program IR118 for Plan Code `09` (Roth Catch-up). This field is displayed as a dollar amount and is generated from BEAR as of PP 01 of the current year.

The following fields are displayed in the Pay section:

Field	Description
Annual Pay	Displays the employee's adjusted salary that consists of the rate of annual basic pay, interim geographic adjustments, and locality comparability payments for the current year. This amount is obtained from the employee's personnel history as of PP 01 of the current year. AUO, availability pay, and stand-by pay amounts are obtained from the Payroll Computation System (PAYE) as of PP 01 of the current year. For detailed information on basic pay, see the CSRS and FERS Handbook for Personnel and Payroll Offices or contact your personnel office. For LEO/FF or enhanced CBPO (Retirement Coverage Codes **M**, **O**, **E**, **T**, **Q**, **0**, and **6**), this is the adjusted salary plus any applicable AUO, availability pay, and standby pay received by the employee in PP 01 of the current year. *Annual Salary = Adjusted Salary + (PP 01 AUO, Availability, Standby*

Field	Description
	Pay x the Number of Pay Periods in the Prior Year) For U.S. Customs employees covered by COPRA, this amount reflects the employee's adjusted salary as of PP 01 of the current year. COPRA overtime is not included in this figure. For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the hourly rate of pay is obtained from the employee's personnel history record as of PP 01 of the current year. Annual Salary is computed as follows: If not **PH** (per hour) employee: Hourly Rate = Adjusted Salary/2087 Annual Salary = (Hourly Rate x Tour-of-Duty Hours x the number of pay periods in the year) For all employees, the adjusted salary salary has been modified for the following conditions: • If the employee's Salary Rate Code is **PD** (per day), the annual salary is computed as follows: *Annual Salary = Daily Rate x 260 (yearly work days)* • If the employee's Salary Rate Code is **PH**, the annual salary is computed as follows: *Annual Salary = Hourly Rate x 2087 (yearly work hours)*

The following fields are displayed in the Total Compensation And Costs section:

Field	Description
Agency Compensation - Prior Year	Displays the summary of the employee's annual salary plus all Government contributions toward: • Government/Non-Government-Wide retirement coverage • Health and life insurance premiums • Medicare coverage • Social Security coverage • Thrift Savings Plan for the employee for the prior year • Annual pay differential for FDIC employees Adjusted salary is obtained from the employee's personnel history as of the last pay period of the prior year. AUO, availability pay, and standby pay are generated from PAYE as of the last pay period of the prior year. Retirement deductions are generated from RETM as of the last pay period of the prior tax year. For most employees, the annual salary is the adjusted salary as of the last pay period of the prior year. For LEO/FF (Retirement Coverage Codes **M**, **E**, **T**, and **6**), this is the last pay period of the prior year's adjusted salary plus any applicable AUO, availability pay, and standby pay received by the employee in the last pay period of the prior year. *Annual Salary = [Last PP of the prior year's Adjusted Salary + PP 01 through the Last PP of the prior year's AUO, Availability, Standby Pay]* For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the hourly rate of pay is obtained from the employee's personnel history as of the last pay period of the prior year. Total hours worked (for the tax year) are

Field	Description
	obtained from RETM as of PP 24 of the prior year. Annual salary is computed as follows: *Hourly Rate = Adjusted Salary/2087* *Annual Salary = [Hourly Rate as of the last pay period of the prior year x Total Hours Worked For The Year]* For U.S. Customs employees covered by COPRA, this amount reflects the employee's prior year annual salary plus benefits and is computed in one of the following ways: FERS and CSRS-Offset employees (Retirement Coverage Codes **K** and **C**): *Annual salary = Prior Year Retirement Deductions x 125.00* CSRS employees (Retirement Coverage Code **1**): *Annual Salary = Prior Year Retirement Deductions x 14.29* FERS and CSRS-Offset CBPO employees (Retirement Coverage Codes **O** and **Q**): *Annual Salary = Prior Year Retirement Deductions x 76.92* CSRS CBPO employees (Retirement Coverage Code **0**): *Annual Salary = Prior Year Retirement Deductions x 13.33*

The following fields are displayed in the Leave section:

Field	Description
Sick Leave Balance - Prior Year	Displays the employee’s carryover sick leave balance for the prior year as it appears on IRIS Program IR136, Annual/Sick Leave, as of the last pay period of the prior year. If the prior year balance is negative, ****** is displayed.
Annual Leave Balance - Prior Year	Displays the employee’s carryover annual leave balance for the prior year as it appears on IRIS Program IR136, as of the last pay period of the prior year. If the prior year balance is negative, zeros are displayed.

The following fields are displayed in the Federal Employees Health Benefits (FEHB) Program section:

Field	Description
FEHB Plan Code	Displays the employee’s FEHB enrollment code as it appears on IRIS Program IR115, Health Benefits, as of PP 01 of the current year.

Field	Description
FEHB Plan Name	Displays the name of the employee’s Government-wide health benefit carrier. If the employee’s health benefit code on IRIS Program IR115 is **1** (Enrolled), the health benefits plan coverage code is used to find the name of the Government-wide benefit carrier on TMGT Table 011, Health Benefit Carrier Name and Address. If the name of the carrier cannot be found, the message *Your Federal Health Carrier Has Discontinued Service, Contact Your Personnel Office* is displayed. If the health benefit plan code and the health benefit option code are both zero, the message *You Are Not Enrolled In A Federal Health Benefit Plan* is displayed.
FEHB Tax Deferred Code	Displays the employee's tax deferred code (if elected) for health benefits as displayed on PINQ Program PQ053, PACS Health, and IRIS Program IR115.
Current Year Bi-Weekly Premium Cost to Employee	Displays the biweekly amount paid by the employee for FEHB coverage.This amount is obtained from PAYE as of PP 01 of the current year. If any full-time employee is enrolled in a health benefit plan in PP 01 but no deductions were recorded, this figure is obtained from TMGT Table 012, Health Benefit Rates, in order to reflect the expected biweekly deduction amount for the current year. If any FDIC employee is enrolled in a Federal health benefit plan in PP 01 but no deductions are recorded, this figure reflects the regular FDIC deduction amount as it appears on TMGT Table 012. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly Premium Cost to Agency	Displays the biweekly amount paid by the Agency for the employee’s FEHB coverage. This amount is obtained from PAYE as of PP 01 of the current year. If the employee is enrolled in a health benefit plan in PP 01 but no deductions are recorded, this figure is obtained from TMGT Table 012 in order to reflect the expected biweekly contribution amount for the current year. If any FDIC employee is enrolled in a Federal health benefit plan in PP 01 but no deductions are recorded, this figure reflects the regular FDIC deduction amount as it appears on TMGT Table 012. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Premium Cost for FEHB	Displays the total biweekly amount paid for the employee’s FEHB coverage. This total is the sum of the employee and Agency current year costs. Manual payments and adjustments are not included in this amount.
Prior Year Annual Premium Cost to Employee	Displays the annual amount by the employee for FEHB coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*************) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details* is displayed.

Field	Description
Prior Year Annual Premium Cost to Agency	Displays the annual amount paid by the Agency for the employee's FEHB coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.
Total Prior Year Premium Cost for FEHB	Displays the total amount paid for the employee's FEHB coverage for the prior calendar year. This total is the sum of the employee and Agency prior year costs. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.

The following fields are displayed in the Federal Employees Group Life Insurance (FEGLI) Program section:

Field	Description
Coverage	Displays the description of the employee's life insurance coverage code as it appears on IRIS Program IR116, Life Insurance. The description is retrieved from TMGT Table 025, Block Number 13. For more information on these coverages, see the OPM publication FEGLI Handbook for Personnel and Payroll Offices or contact your personnel office.
Current Year Bi-Weekly Premium Cost to Employee for Basic Coverage	Displays the amount paid each pay period by the employee for FEGLI basic coverage for the current year. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount
Current Year Bi-Weekly Premium Cost to Agency for Basic Coverage	Displays the amount paid each pay period by the Agency for the employee's FEGLI basic coverage for the current year. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Premium Cost for Basic Coverage	Displays the total amount paid each pay period for the employee's FEGLI basic coverage for the current year. This total is the sum of the employee and Agency costs. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly Premium Cost to Employee for Standard Coverage	Displays the amount paid each pay period by the employee for FEGLI standard coverage for the current year. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.

Field	Description
Current Year Bi-Weekly Premium Cost to Employee for Additional Coverage	Displays the amount paid each pay period by the employee for FEGLI additional coverage for the current year. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly Premium Cost to Employee for Family Coverage	Displays the amount paid each pay period by the employee for FEGLI family coverage for the current year. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Premium Cost to Employee for Optional Coverage	Displays the total amount paid each pay period by the employee for FEGLI optional coverage for the current year. Manual payments and adjustments are not included in this amount.
Prior Year Annual Premium Cost to Employee for Basic Coverage	Displays the annual amount paid by the employee for FEGLI basic coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual Premium Cost to Agency for Basic Coverage	Displays the annual amount paid by the Agency for employee's FEGLI basic coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.
Total Prior Year Annual Premium Cost for Basic Coverage	Displays the total annual amount paid for the employee's FEGLI basic coverage for the prior year. This total is the sum of the employee and Agency costs. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual Premium Cost to Employee for Standard Coverage	Displays the annual amount paid by the employee for FEGLI standard coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Prior Year Annual Premium Cost to Employee for Additional Coverage</td><td> Displays the annual amount paid by the employee for FEGLI additional coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details. </td></tr>
<tr><td>Prior Year Annual Premium Cost to Employee for Family Coverage</td><td> Displays the annual amount paid by the employee for FEGLI family coverage for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details. </td></tr>
<tr><td>Total Prior Year Annual Premium Cost to Employee for Optional Coverage</td><td> Displays the total annual amount paid by the employee for FEGLI optional coverage for the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (*********) and a footnote will display stating Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details. </td></tr>
<tr><td>FEGLI Basic Coverage Amount, Not Accidental Death</td><td> Displays the employee’s FEGLI basic coverage amount payable at death. If the employee has not elected FEGLI Basic Coverage, N/A is displayed. For most employees, the basic FEGLI coverage amount is equal to the life insurance coverage as it appears on IRIS Program IR116, multiplied by 1,000 (annual salary, rounded to the next 1,000). For LEO/FF (Retirement Coverage Codes 6, E, M, or T) who receive AUO, availability pay, or standby pay in PP 01, the basic FEGLI coverage is computed as follows: Step 1. Multiply the appropriate AUO, availability pay, or standby pay received in PP 01 of the current year by the number of pay periods in the year.
Step 2. Add the results of Step 1 to the employee's adjusted salary as of PP 01.
Step 3. Round the results of Step 2 up to the nearest thousand dollars.
Step 4. Basic FEGLI coverage amount = Step 3 amount = $2,000. For U.S. Customs employees (enhanced CBPOs) covered by COPR, the basic FEGLI coverage amount is computed as follows: Step 1. Determine the employee's hourly rate as of PP 01 of</td></tr>
</table>

Field	Description
	the current year. This is equal to the employee's adjusted salary divided by 2087 (yearly work hours). • Step 2. Compute [Step 1 Hourly Rate x COPR Overtime (OT) Hours as of PP 26 of the prior year (IR103, Salary YTD Data) x 2]. • Step 3. Compute [Step 1 Hourly Rate x COPR-Commute Hours as of the last pay period of the prior year (IR103) x 3]. • Step 4. Add Steps 2 and 3 (limited to $15,000). • Step 5. Add results of Step 4 to the employee's adjusted salary. • Step 6. Round results of Step 5 to nearest $1,000. • Step 7. Basic FEGLI coverage amount = Step 6 + $2,000.

The following table reflects the extra benefits payable at certain ages for FEGLI basic coverage:

If Employee's Age Is:	Amount Payable Is:
0 - 35	FEGLI basic coverage amount x 2
36	FEGLI basic coverage amount x 1.9
37	FEGLI basic coverage amount x 1.8
38	FEGLI basic coverage amount x 1.7
39	FEGLI basic coverage amount x 1.6
40	FEGLI basic coverage amount x 1.5
41	FEGLI basic coverage amount x 1.4
42	FEGLI basic coverage amount x 1.3
43	FEGLI basic coverage amount x 1.2
44	FEGLI basic coverage amount x 1.1
45 and over	FEGLI basic coverage amount x 1

The following fields are displayed in the Federal Employees Group Life Insurance (FEGLI) Program section:

Field	Description
FEGLI Standard Coverage Amount, Not Accidental Death	Displays the employee's optional life insurance amount payable at death from any cause. If the employee has elected Option A, Standard, the amount displayed is `$10,000`. If the employee has not elected FEGLI standard coverage, `N/A` is displayed.

Field	Description
FEGLI Additional Coverage Amount, Not Accidental Death	Displays the employee's additional life insurance amount payable at death from any cause. If the employee has not elected Option B, Additional, **N/A** is displayed.

If the employee has elected Option B, Additional, the amount is computed as follows:

If Option B, Additional, Is:	Amount Payable Is:
1	(FEGLI Coverage Amount - $2,000) x 1
2	(FEGLI Coverage Amount - $2,000) x 2
3	(FEGLI Coverage Amount - $2,000) x 3
4	(FEGLI Coverage Amount - $2,000) x 4
5	(FEGLI Coverage Amount - $2,000) x 5

The following fields are displayed in the Federal Employees Group Life Insurance (FEGLI) Program section:

Field	Description
Total FEGLI Basic, Standard, and Additional Coverage Amount, Not Accidental Death	Displays the employee's total amount of FEGLI Basic, Standard, and Additional Coverage payable at death.
FEGLI, Basic Coverage Amount, Accidental Death	Displays the amount payable under FEGLI basic coverage if death is accidental. This amount equals FEGLI basic life insurance coverage plus the basic amount payable if death is not accidental but with no extra benefit for age.
FEGLI Standard Coverage Amount, Accidental Death	Displays the amount payable under FEGLI standard coverage if death is accidental. This amount equals FEGLI standard coverage multiplied by 2. If the employee has not elected Option A, Standard, **N/A** is displayed.
FEGLI Additional Coverage Amount, Accidental Death	Displays the amount payable under FEGLI additional coverage if death is accidental. This amount is the same as the amount payable if death is not accidental. If the employee has not elected Option B, Additional, **N/A** is displayed.

Field	Description
Total FEGLI Basic, Standard, Additional Coverage Amount, Accidental Death	Displays the total amount payable under FEGLI basic, standard, and additional coverage if death is accidental.
FEGLI Family Coverage Amount, Death of Spouse	Displays the amount payable under FEGLI family coverage to the employee in case of death of the employee's spouse. This coverage amount is computed as 5,000 x Option C Factor as displayed on IRIS Program IR116. If the employee has not elected FEGLI family coverage, **N/A** is displayed.
FEGLI Family Coverage Amount, Death of Child	Displays the amount payable under FEGLI family coverage to the employee in case of death of an employee's child. This coverage amount is computed as 2,500 X Option C Factor as displayed on IRIS Program IR116. If the employee has not elected FEGLI family coverage, **N/A** is displayed.
Accidental Loss of Limbs or Total Eyesight	Displays the amount payable to the employee for accidental loss of limbs or eyesight under accidental dismemberment insurance. If the employee has no basic life insurance, he/she is not eligible for accidental dismemberment coverage. If the employee has Option A, Standard Life Insurance, the amount payable is the FEGLI coverage amount plus $10,000. For all other options, the amount payable is the FEGLI coverage amount.
Accidental Loss of One Limb or One Eye	Displays the amount payable to the employee for the accidental loss of one limb or one eye under accidental dismemberment insurance. If the employee has no basic life insurance, he/she is not eligible for accidental dismemberment coverage. The amount payable is one-half of the amount paid for accidental loss of limbs or total eyesight.

The following fields are displayed in the Thrift Savings Plan (TSP) section:

Field	Description
Current Year Bi-Weekly TSP Regular Contributions by Employee	Displays the biweekly amount the employee contributed to his/her TSP account. This amount is displayed on IRIS Program IR118 for Plan Code 01 or Plan Code 02. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly TSP Roth Contributions by Employee	Displays the biweekly non-tax-deferred Roth contribution to his/her TSP account. This amount is displayed on IRIS Program IR118 for Plan Code 98 or Plan Code 99. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly TSP Regular Contributions by Agency	Displays the biweekly amount the Agency contributes to the employee's TSP account. This amount is displayed in the TS-CONTRIB-THRIFT-SAV field on PINQ Program PQ056, PACS Thrift Savings, for Plan Code 01. This field appears on FERS and FSPS statements only for Retirement Coverage Codes **I**, **K**, **M**, **O**, and **P**. This

Field	Description
	amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly TSP Regular Catch-up Contributions by Employee	Displays the employee's biweekly traditional catch-up contribution to the employee's TSP account. This amount is displayed on IRIS Program IR118, Record 002 for Plan Code `06`. This amount is obtained from PAYE as of PP 01 of the current year.
Current Year Bi-Weekly TSP Roth Catch-up Contributions by Employee	Displays the employee's biweekly non-tax-deferred Roth catch-up contributions to the employee's TSP account. This amount is displayed on IRIS Program IR118, Record 002 for Plan Code `09`. This amount is obtained from PAYE as of PP 01 of the current year.
Total Current Year Bi-Weekly TSP Regular Contributions	Displays the total biweekly traditional contributions to the employee's TSP account. This field is the total of the employee and Agency TSP regular contributions and the TSP regular catch-up contributions by the employee. This field appears on FERS and FSPS statements for Retirement Coverage Codes **I**, **K**, **M**, **O**, and **P**. For employees that do not receive Agency contributions, this field is the total of the employee's TSP regular and TSP regular catch-up contributions and appears on the CSRS and FSRDS statements for Retirement Coverage Codes **0**, **1**, **3**, **6**, **7**, **C**, **D**, **E**, **G**, **Q**, **R**, and **T**. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly TSP Roth Contributions	Displays the total biweekly non-tax-deferred Roth contributions to the employee's TSP account. This field is the total of the employee's TSP Roth contributions and the TSP Roth catch-up contributions. Manual payments and adjustments are not included in this amount.
Prior Year Annual TSP Regular Contributions by Employee	Displays the sum of the employee's biweekly traditional contributions to his/her TSP account for the prior calendar year. This amount is obtained from PAYE as of the last pay period of the prior calendar year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (**********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual TSP Roth Contributions by Employee	Displays the sum of the employee's biweekly non-tax-deferred Roth contributions to his/her TSP account during the prior calendar year. This amount is obtained from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (**********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.

Field	Description
Prior Year Annual TSP Regular Contributions by Agency	Displays the biweekly amount the Agency contributes to the employee's TSP account for the prior year. This field appears on FERS and FSPS statements only for retirement coverage codes **I**, **K**, **M**, and **P**. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual TSP Regular Catch-up Contributions by Employee	Displays the sum of the employee's biweekly traditional TSP catch-up contributions to his/her TSP account during the prior calendar year. This amount can be seen on IRIS Program IR118. This amount is obtained from PAYE as of the last pay period of the prior year.
Prior Year Annual TSP Roth Catch-up Contributions by Employee	Displays the sum of the employee's biweekly non-tax-deferred Roth catch-up contributions to his/her TSP account during the prior calendar year. This amount is obtained from PAYE as of the last pay period of the prior year.
Total Prior Year Annual TSP Regular Contributions	Displays the total amount contributed to the employee's TSP account for the prior year. This total is the sum of the employee's regular, regular catch-up and the Agency's regular TSP contributions. This field appears on FERS and FSPS statements only for Retirement Coverage Codes **I**, **K**, **M**, **O**, and **P**. For employees that do not receive Agency contributions, this field displays the sum of the employee's regular and regular catch-up contributions only and appears on the CSRS and FSRDS statements for Retirement Coverage Codes **0**, **1**, **3**, **6**, **7**, **C**, **D**, **E**, **G**, **Q**, **R**, and **T**. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Total Prior Year Annual TSP Roth Contributions	Displays the total amount of the biweekly non-tax-deferred Roth contributions to the employee's TSP account during the prior calendar year. This total is the sum of the employee's TSP Roth and TSP Roth catch-up contributions.
TSP Account Balance	Displays the employee's TSP account balance which is obtained from the TSP Record Keeper as of December 31st of the prior year.
TSP Roth Balance	Displays the employee's TSP Roth balance which is obtained from the TSP Record Keeper as of December 31st of the prior year.

Field	Description
Estimated TSP Account Balance at Earliest Retirement Date	Displays the estimated balance of the employee's TSP account at the employee's earliest eligible retirement date under either special LEO/FF service or regular service. This balance is computed according to the following format: Projected Balance = [**B** x 1.0723^N] +[**S** x **C** x (1.0723^N - 14.3081)] **B** = TSP account balance as of December 31 of the prior year **N** = Number of years additional service to be performed **S** = PP 01 adjusted annual salary **C** = Employee and Agency biweekly TSP contribution rate, expressed as a percentage of annual salary. For detailed instructions on estimating TSP account balances, access *www.tsp.gov*.
TSP Annuity Interest Rate Index	Displays the TSP annuity interest rate index for December of the prior year. The rate used in 2019 is 1.750 percent.
Employee Age at TSP Estimated Monthly Annuity	Displays the employee's age at the estimated retirement date. This is determined by subtracting the date of birth from the applicable optional retirement date.
TSP Estimated Premium Monthly Annuity for Single Life Annuity	Displays the estimated single life annuity (level payments, no added features) at the age displayed in the If You Retire At Age field. For LEO/FF, this will correspond to the earliest group of retirement displayed under the If You Retire At Age field under Special Service. For all other employees, this will correspond to the earliest group of retirement annuities displayed under If You Retire At Age under Regular Service. The annuity factor tables used in these estimates are effective January 2020 until superseded. (See *www.tsp.gov* for updates.) The annuity estimate is determined as follows: • Step 1. Compute [estimated TSP balance/1,000]. • Step 2. Determine monthly annuity factor per $1,000 account balance (see table below). • Step 3. Calculate preliminary monthly annuity payment [Step 1 x Step 2]. • Step 4. Obtain current interest rate index (see TSP Annuity Interest Rate Index). • Step 5. Obtain interest rate index used in annuity table below. This is 7.0000 percent. • Step 6. Determine interest rate increase/decrease [Step 4 - Step 5]. • Step 7. Obtain interest adjustment factor (see Interest Adjustment Factors for Single Life Annuities table below). • Step 8. Determine adjustment multiplier [Step 6 x Step 7]. • Step 9. Determine increase/decrease to estimate [Step 3 x Step 8]. • Step 10. Determine estimated monthly annuity adjusted for current interest rate [Step 3 + Step 9].

Monthly Single Annuity Factors (No Added Features) Per $1,000 Account Balance (7%) Table

Employee's Age	Annuity Factor
44	$6.99
45	$7.21
46	$7.26
47	$7.31
48	$7.37
49	$7.43
50	$7.50
51	$7.57
52	$7.67
53	$7.72
54	$7.80
55	$7.89
56	$7.99
57	$8.09
58	$8.20
59	$8.32
60	$8.45
61	$8.58
62	$8.73
63	$8.89
64	$9.06
65	$9.24
66	$9.44
67	$9.65
68	$9.88

Employee's Age	Annuity Factor
69	$10.13
70	$10.39
71	$10.68
72	$10.99
73	$11.32
74	$11.68
75	$12.08
76	$12.20
77	$12.32
78	$12.38
79	$12.87
80	$13.39
81	$13.96
82	$14.57
83	$15.23
84	$15.94
85	$16.69
86	$17.50
87	$18.35
88	$19.27
89	$20.23
90	$21.25
91	$22.33
92	$23.46
93	$24.67

Employee's Age	Annuity Factor
94	$25.95

Interest Adjustment Factors for Single Life Annuities Table

Employee's Age Bracket	Factor
25 - 44	0.117
45 - 54	0.101
55 - 59	0.092
60 - 64	0.083
65 - 91	0.075

The following fields are displayed in the Thrift Savings Plan (TSP) section:

Field	Description
TSP Estimated Monthly Annuity for Joint Life (Spouse) Annuity	Displays the estimated joint life annuity (level payments, no added features) at the age displayed in the If You Retire At Age field. For LEO/FF, this will correspond to the earliest group of retirement annuities displayed in the If You Retire At Age under Special Service field. For all other employees, this will correspond to the earliest group of retirement annuities displayed in the If You Retire At Age under Regular Service field. The annuity factor tables used in these estimates are effective January 2020 until superseded. (See *www.tsp.gov* for updates.) This annuity estimate is determined according to the following steps: • Step 1. Compute [Estimated TSP Account Balance at Earliest Retirement Date/1,000]. • Step 2. Determine monthly annuity factor per $1,000 account balance (see table below). • Step 3. Calculate preliminary monthly annuity payment [Step 1 x Step 2]. • Step 4. Obtain current interest rate index. • Step 5. Obtain interest rate index used in annuity table below.This is 7.0000 percent. • Step 6. Determine interest rate increase/decrease [Step 4 - Step 5]. • Step 7. Obtain interest adjustment factor (see table below). • Step 8. Determine adjustment multiplier [Step 6 x Step 7]. • Step 9. Determine increase/decrease to estimate [Step 3 x Step 8]. • Step 10. Determine estimated monthly annuity adjusted for current interest rate [Step 3 + Step 9].

Monthly Joint Annuity Factors (No Added Feature) Per $1,000 Account Balance (7%) Table

Employee's Age	Annuity Factor
44	$6.73
45	$6.79
46	$6.82
47	$6.85
48	$6.88
49	$6.92
50	$6.96

Employee's Age	Annuity Factor
51	$7.00
52	$7.04
53	$7.09
54	$7.14
55	$7.19
56	$7.25
57	$7.31
58	$7.38
59	$7.45
60	$7.53
61	$7.61
62	$7.71
63	$7.80
64	$7.91
65	$8.02
66	$8.15
67	$8.28
68	$8.42
69	$8.58
70	$8.75
71	$8.93
72	$9.13
73	$9.34
74	$9.57
75	$9.82

Employee's Age	Annuity Factor
76	$9.82
77	$9.82
78	$9.82
79	$10.16
80	$10.50
81	$10.87
82	$11.26
83	$11.69
84	$12.14
85	$12.63
86	$13.16
87	$13.71
88	$14.31
89	$14.94
90	$15.61
91	$16.32
92	$17.07
93	$17.88
94	$18.74

Interest Adjustment Factors For Joint Life Annuities

Employee's Age Bracket	Factor
25 - 44	0.127
45 - 54	0.111
55 - 59	0.103

Employee's Age Bracket	Factor
60 - 64	0.097
65 - 91	0.087

The following fields are displayed in the Benefits Under The Federal Employees Retirement System (FERS) section:

Field	Description
Current Year Bi-Weekly Retirement Coverage Costs to Employee	Displays the amount paid by the employee each pay period toward his/her retirement account for the current year. This item is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly Retirement Coverage Costs to Agency	Displays the amount paid by the Agency each pay period toward the employee's retirement account for the current year. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Retirement Coverage Costs	Displays the total amount paid each pay period toward the employee's retirement account for the current year. This total is the sum of the Current Year Biweekly Cost to Employee for Retirement and the Current Year Biweekly Cost to Agency for Retirement. Manual payments and adjustments are not included in this amount.
Prior Year Annual Retirement Coverage Costs to Employee	Displays the amount paid by the employee toward his/her retirement account for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. Manual payments and adjustments are not included in this amount. In cases where this amount is negative usually due to adjustments, this field will contain asterisks (******) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details.*
Prior Year Annual Retirement Coverage Costs to Agency	Displays the amount paid by the Agency toward the employee's retirement account for the prior year. This amount is obtained from PAYE as of the last pay period of the prior year. Manual adjustments and manual payments not included in this amount. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (******) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.

Field	Description
Total Prior Year Annual Retirement Coverage Costs	Displays the total amount paid towards the employee's retirement account for the prior year. This total is the sum of the Prior Year Annual Cost to Employee for Retirement and the Prior Year Annual Cost to Agency for Retirement. Manual payments and adjustments are not included in this amount. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (**********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact appropriate office or individual as designated by your employing organization for details*.
High-3 Average Pay for Retirement	Displays the estimate of the employee's High-3 Average Pay for the earliest Eligible Retirement Date Under Regular Service. For LEO/FF, this estimate corresponds to the earliest Eligible Retirement Date Under Special Service. In computing the High-3 Average Pay, the rate of basic pay is used, not the actual pay received by the employee. For more information on pay entitlement included in these calculations, see the CSRS and FERS Handbook for Personnel and Payroll Offices or contact your personnel office. For the purpose of this statement: • Retirement benefits beginning more than 3 years in the future have been estimated using the employee's adjusted salary as of the date of the statement as the Retirement High-3. • Retirement benefits payable within the next 3 years have been estimated using a Retirement High-3 consisting of the employee's adjusted salary averaged over a 3-year period prior to the proposed retirement date. • For part-time employees with the work schedules of **P**, **Q**, **S**, and **T**, the employee's deemed salary (the salary the employee would have earned if he/she were full time), not the actual part-time salary earned, is used as the rate of pay. • Accumulated sick leave is not included in these calculations. If LEO/FF, Retirement Coverage Codes **M**, **E**, **T**, and **6**, received any appropriate AUO, availability pay, or standby pay for the 3-year period, it is included in the Retirement High-3 calculations. If the employee will not have 20 years of special service at ages 50, 55, or 57, the statement includes dates at which he/she will have the 20 years of special service. Also, if the employee's 6C Retirement date as displayed on IRIS Program IR102, is incorrect or invalid, the employee will not receive a statement. Invalid means the 6c retirement date is not a valid date, is earlier than the employee's retirement SCD, or is later than the statement date. For U.S. Customs employees covered by COPRA, the Retirement High-3 is determined as follows: • For employees eligible to retire within the next 3 years, the High-3 consists of prior year earnings, including allowable overtime (not to exceed $15,000 in a fiscal year) averaged

Field	Description
	over a 3-year period prior to the statement date. • Earnings for prior years are calculated by multiplying each year's retirement contributions displayed in RETM by a factor of `125.00` for employees with Retirement Coverage Codes `K` or `C`, by a factor of `76.92` by employees with Retirement Coverage Codes `O` or `Q`, by a factor of `14.29` for employees with Retirement Coverage Code `1`, and by as factor of `13.33` for employees with Retirement Coverage Code `0`. • For employees not eligible to retire within the next 3 years, the High-3 consists of earnings and allowable overtime for the prior calendar year. The following steps explain the approach used in determining the employee's High-3: • Step 1. Subtract 3 years from the proposed retirement date and locate different rates of basic pay in effect over the 3-year period. • Step 2. Determine the first time interval covering the same rate of basic pay (subtract the beginning date containing all equal basic pay amounts from the ending date). • Step 3. Determine the time factor using the 360 Day Factor Chart (see the CSRS and FERS Handbook for Personnel and Payroll Offices) or a 360 Day Factor Formula. • Step 4. Compute the actual pay earned by multiplying the pay rate in effect by the time factor and round to the nearest cent. • Step 5. Follow Steps 3 and 4 again for subsequent changes of pay rates until the total time factor is 3 years. The total time factor will not always equal exactly 3 years. For example, 2.988000 or 3.006666 would be appropriate. • Step 6. Total all actual earnings during the entire 3-year period. • Step 7. Divide the total pay earned by 3 or, if an employee has not worked 3 years, use the actual length of time the employee has worked to compute the High-3 Average Pay. In preparing this statement, the following guidelines are used: • For retirement computation purposes, all months have 30 days. No credit is given for the thirty-first day of the month. A year consists of 360 days (12 x 30 days). All remaining days are dropped. • When subtracting the beginning day of a pay period of service from the ending day of a period of service, a day is added to the ending date to derive the length of the period. • When it is necessary to borrow a month, the time borrowed is always 30 days. When it is necessary to borrow a year, the time borrowed is always 12 months.
Age at Earliest Retirement Date	Displays the employee's age associated with the earliest eligible retirement date. This is obtained by subtracting the employee's date of birth from the earliest retirement date.

Field	Description
Length of Service at Earliest Retirement Date	Displays the employee's length of service associated with the earliest eligible retirement date. This field is computed as follows: *Length of Service = [Earliest Retirement Date - Retirement SCD Date]* In the above calculations, the Length of Service displayed for part-time employees (Work Schedules **P**, **Q**, **S**, and **T**) is not prorated for tour of duty. The full length of service is used in each annuity computation. The final annuity computation is then prorated for tour of duty. This method is used because the full tour of duty is not available.
Age at Retirement Date Under Special Service	Displays the employee's age at the eligible retirement under LEO/FF service or COPRA service. Up to four options may be displayed. This is obtained by subtracting the employee's date of birth from the **Eligible Retirement Date Under Special Service**. This field appears on LEO/FF and enhanced CBPO statements only (Retirement Coverage Codes **M**, **O**, **E**, **T**, **Q**, and **6**).
Eligible Retirement Date Under Special Service	Displays the employee's eligible retirement date under LEO/FF service or COPRA service. Up to four options may be displayed for FERS employees. All others will show up with three options. The fourth option of retirement with 25 years of service at any age applies to FERS only. This is the date at which the employee will have 20 years of special service at ages 50, 55, or 57. The statement will reflect the date at which he/she will have the 20 years of special service. This field appears on LEO/FF and enhanced CBPO statements only (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, and **6**).

Field	Description
Estimated Monthly Annuity With No Survivor Benefit Under Special Service	Displays the estimated annuity (with no survivor benefit) that the employee will receive at the specified age and date under LEO/FF service or COPRA service. Up to four options may be displayed for FERS employees. All others will show up with three options. The fourth option of retirement with 25 years of service at any age applies to FERS only. This field appears on LEO/FF and enhanced CBPO statements only (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, and **6**). FERS LEO/FF (Retirement Codes **M** and **O**): Monthly annuity is computed using High-3 Average Pay with total creditable service up to the eligible retirement date and FERS Special retirement formulas displayed in ***Appendix C: Federal Employees Retirement System (FERS) - Special Retirement (Retirement Coverage Code M)*** (on page 155). CSRS and CSRS-Offset LEO/FF (Retirement Codes **E**, **T**, **Q**, **0**, and **6**): Monthly annuity is computed using High-3 Average Pay with total creditable service up to the eligible retirement date and applicable CSRS or CSRS-Offset retirement formulas displayed in ***Appendix E: Civil Service Retirement System (CSRS) and CSRS-Offset Special Retirement (Retirement Coverage Codes E, T, and 6)*** (on page 159). In the above calculations, the Years of Service is prorated by the PP 01 tour-of-duty for part-time employees (Work Schedules **P**, **Q**, **S**, and **T**). This estimate is used because the complete tour-of-duty proration is not available.
Estimated Monthly Annuity Reduced For Survivor Benefit Under Special Service	Displays the estimated monthly annuity (with full survivor benefit) that the employee will receive at the specified age and date under LEO/FF service or COPRA service. Up to four options may be displayed for FERS employees. All others will show up with three options. The fourth option of retirement with 25 years of service at any age applies to FERS only. This field appears on LEO/FF and enhanced CBPO statements only (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, and **6**). FERS LEO/FF (Retirement Codes **M** and **O**): This amount is equal to 90% of the employee's estimated monthly annuity without survivor benefits. CSRS and CSRS-Offset (Retirement Codes **E**, **T**, **Q**, **0**, and **6**): The estimated monthly annuity is computed as follows: • Step 1. Compute [Monthly Annuity Without Survivor Benefit x 12]. • Step 2. Compute [First $3,600 of Step 1 amount x 2.5%]. • Step 3. Compute [Step 1 - $3,600] x 10%. • Step 4. Compute [Step 2 + Step 3]. • Step 5. Compute [Step 1 - Step 4]. • Step 6. Compute [Step 5/12].

Field	Description
Estimated Monthly Annuity With Survivor Benefit Under Special Service	Displays the estimated annuity (with full survivor benefit) the employee's eligible spouse will receive at the employee's specified age and date under special LEO/FF service or COPRA service. Up to four options may be displayed for FERS employees. All others will show up to three options. The fourth option of retirement with 25 years of service at any age applies to FERS only. This field appears on LEO/FF and enhanced CBPO statements only (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, and **6**). FERS LEO/FF (Retirement Codes **M** and **O**): This amount is equal to 50% of the employee's estimated monthly annuity without survivor benefits. CSRS and CSRS-Offset LEO/FF (Retirement Codes **E**, **T**, **Q**, **0**, and **6**): This amount is equal to 55% of the employee's estimated monthly annuity without survivor benefits.
Age at Retirement Date Under Regular Service	Displays the employee's age at the eligible retirement date under regular service. Up to three options may be displayed. This is obtained by subtracting the employee's date of birth from the eligible retirement date. If the employee is covered by FERS, CSRS or CSRS-Offset LEO/FF, or COPRA retirement (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, or **6**) and meets the age and length of service requirements for the plan as of the first day of PP 01, **N/A** is displayed.
Eligible Retirement Date Under Regular Service	Displays the employee's eligible retirement date under regular service. Up to three options may be displayed. If the employee is covered by FERS, CSRS or CSRS-Offset LEO/FF, or COPRA retirement (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, or **6**), and meets the age and length of service requirements for the plan as of the first day of PP 01, **N/A** is displayed.

Field	Description
Estimated Monthly Annuity With No Survivor Benefit Under Regular Service	Displays the estimated annuity (with no survivor benefit) that the employee will receive at the specified age and date under regular service. Up to three options may be displayed. If the employee is covered by FERS, CSRS or CSRS-Offset LEO/FF, or COPRA retirement (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, or **6**) and meets the age and length of service requirements for the plan, this item will be blank. FERS and FERS LEO/FF (Retirement Codes **K**, **M**,and **O**): Monthly annuity is computed using High-3 Average Pay with total creditable service up to the eligible retirement date and FERS retirement formulas displayed in ***Appendix B: Regular Federal Employees Retirement System (FERS) (Retirement Coverage Code K)*** (on page 151) and ***Appendix C: Federal Employees Retirement System (FERS) - Special Retirement (Retirement Coverage Code M)*** (on page 155). CSRS, CSRS-Offset, and CSRS-Offset LEO/FF (Retirement Codes **1**, **C**, **R**, **E**, **T**, **Q**, **0**, and **6**): Monthly annuity is computed using High-3 Average Pay with total creditable service up to the eligible retirement date and applicable CSRS or CSRS-Offset retirement formulas displayed in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157) and ***Appendix E: Civil Service Retirement System (CSRS) and CSRS-Offset Special Retirement (Retirement Coverage Codes E, T, and 6)*** (on page 159). FSRDS (Retirement Codes **3** and **G**): Monthly annuity is computed using High-3 Average Pay with total creditable service up to the eligible retirement date and FSRDS retirement formulas in ***Appendix G: Foreign Service Retirement and Disability System (FSRDS) and FSRDS-Offset Retirement (Retirement Coverage Codes 3 and G)*** (on page 163) FSPS (Retirement Code **P**): Monthly annuity is computed using High-3 Average Pay with total creditable service up to the eligible retirement date and FSPS retirement formulas in ***Appendix F: Foreign Service Pension System (FSPS) (Retirement Coverage Code P)*** (on page 161). In the above calculations, the Years of Service is prorated by the PP 01 tour-of-duty for part-time employees (Work Schedules **P**, **Q**, **S**, and **T**). This estimate is used because the complete tour-of-duty is not available.

Field	Description
Estimated Monthly Annuity Reduced For Survivor Benefit Under Regular Service	Displays the estimated annuity (with full survivor benefit) that the employee will receive at the specified age and date. Up to three options may be displayed. If the employee is covered by FERS, CSRS or CSRS-Offset, LEO/FF, or COPRA retirement (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, or **6**) and meets the age and length of service requirements for the plan, **N/A** is displayed. FERS, FSPS, and FERS LEO/FF (Retirement Codes **K**, **M**, **O**, and **P**): This amount is equal to 90% of the employee's estimated monthly annuity without survivor benefits. CSRS, CSRS-Offset, FSRDS, FSRDS-Offset, and corresponding LEO/FF (Retirement Codes **0**, **1**, **3**, **6**, **C**, **E**, **G**, **R**, **T**,and **Q**): • Step 1. Compute [Monthly Annuity without Survivor Benefit x 12]. • Step 2. Compute [(First $3,600 of Step 1 amount) x 2.5%]. • Step 3. Compute [Step 1 - $3,600] x 10%]. • Step 4. Compute [Step 2 + Step 3]. • Step 5. Compute [Step 1 - Step 4]. • Step 6. Compute [Step 5/12].
Estimated Monthly Annuity With Survivor Benefit Under Regular Service	Displays the estimated annuity (with full survivor benefit) the employee's spouse will receive at the specified age and date. Up to three options may be displayed. If the employee is covered by FERS, CSRS or CSRS-Offset LEO/FF, or COPRA retirement (Retirement Codes **M**, **O**, **E**, **T**, **Q**, **0**, or **6**) and meets the age and length of service requirements for the plan, **N/A** is displayed. If the employee is a LEO/FF (Retirement Codes **0**, **6**, **E**, **T**, or **Q**) and has at least 20 years of special service at any age, this field will display the estimated enhanced annuity (with full survivor benefits) that the employee's eligible spouse will receive. FERS, FSPS, and FERS LEO/FF (Retirement Codes **K**, **M**, **O**, and **P**): This amount is equal to 50% of the employee's estimated monthly annuity without survivor benefits. CSRS, CSRS-Offset, FSRDS, FSRDS-Offset, and corresponding LEO/FF (Retirement Codes **0**, **1**, **3**, **6**, **C**, **E**, **G**, **R**, **T**,and **Q**): This amount is equal to 55% of the employee's estimated monthly annuity without survivor benefits.

Field	Description
Disability High-3	Displays the employee's Disability High-3 as of the statement date, disability and survivor benefits payable are estimated using a Disability High-3 consisting of the employee's Adjusted-Salary averaged over a 3-year period prior to the date of the statement. For part-time employees (Work Schedules `P`, `Q`, `S`, and `T`), the actual pay earned for a 3-year period is used, or the "deemed salary" as in the High-3 Average Pay for Retirement. Actual pay (Annual Salary) is determined using the total hours the employee worked in each of the 3 years. The hourly rate of pay is obtained from RETM as of PP 24 of the prior year. Annual schedule is calculated as follows: *Annual Salary = [Hourly Rate x Total Hours Worked for Year]* For U.S. Customs employees covered by COPRA, the Disability High-3 pay consists of prior year earnings including allowable overtime (not to exceed $15,000 in a fiscal year) averaged over a 3-year period prior to the statement date.
Estimated Monthly Disability Pension	Displays the employee's estimated monthly disability pension. Disability and survivor benefits payable are estimated using the Disability High-3. Creditable service is computed using the employee's Retirement SCD. Special or 6C service is computed using the employee's 6C Retirement SCD. FERS (Retirement Code `K`): If the employee's creditable service is less than 18 months, then no monthly disability pension is allowed. For employees with 18 months or more of creditable service, the monthly disability pension for the first year is computed as follows: If the employee is age 62 or older, determine monthly pension using FERS retirement formulas displayed in ***Appendix B: Regular Federal Employees Retirement System (FERS) (Retirement Coverage Code K)*** (on page 151). If the employee is less than 62 years of age: • Step 1. Determine monthly pension; Compute [(Disability High-3 x 60%)/12]. • Step 2. Determine monthly pension using FERS retirement formulas displayed in ***Appendix B: Regular Federal Employees Retirement System (FERS) (Retirement Coverage Code K)*** (on page 151) and total creditable service up to the date of the statement. Replace Retirement High-3 by Disability High-3. • Step 3. Compare Steps 1 and 2 and select the larger of the amounts. FERS LEO/FF (Retirement Codes `M` and `O`): Any appropriate AUO, availability pay, or standby pay received over the 3-year period was included in the Disability High-3. If the employee's past creditable service is less than 18 months, then no monthly disability pension is allowed. For employees with 18 months or more of creditable service, the monthly disability pension for the first year is computed as follows: If the employee does not have 25 years of special service and is not at least 50 years of age with 20 years of special service, see steps above

Field	Description
	for FERS employees. If the employee is at least 50 years of age with 20 or more years of special service, or has 25 years of special service at any age, the monthly pension is computed as follows: If the employee is age 62 or older, determine monthly pension using total creditable service up to the date of the statement and FERS special retirement formulas displayed in ***Appendix C: Federal Employees Retirement System (FERS) - Special Retirement (Retirement Coverage Code M)*** (on page 155), replacing Retirement High-3 with Disability High-3. If the employee is less than 62 years of age: • Step 1. Determine monthly pension: Compute [Disability High-3 x 60%/12]. • Step 2. Determine monthly pension using the total creditable service up to the date of the statement and FERS special retirement formulas displayed in ***Appendix C: Federal Employees Retirement System (FERS) - Special Retirement (Retirement Coverage Code M)*** (on page 155), replacing Retirement High-3 with Disability High-3. • Step 3. Compare Steps 1 and 2 and select the larger of the amounts. CSRS and CSRS-Offset (Retirement Codes `1`, `C`, and `R`): If the employee's past creditable service is less than 5 years, then no monthly disability pension is allowed. For employees with 5 or more years of creditable service, the monthly disability is computed as follows: If the employee is 60 years of age or older, the monthly annuity is computed as follows: Determine the monthly pension using total creditable service up to the date of the statement and the applicable CSRS or CSRS-Offset retirement formulas displayed in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157), replacing Retirement High-3 with Disability High-3. This amount is limited to a maximum of [(Disability High-3 x 80%)/12]. If the employee is less than 60 years of age, the monthly annuity is computed as follows: • Step 1. Determine monthly pension: Compute [(Disability High-3 x 40%)/12]. • Step 2. Determine monthly pension using credited past service and future service to age 60 and the applicable CSRS or CSRS-Offset formulas displayed in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157), replacing Retirement High-3 with Disability High-3. This is limited to a maximum of Disability High-3 x 80%/12. • Step 3. Compare Steps 1 and 2 and select the smaller of the

Field	Description
	amounts. • Step 4. Determine monthly pension using total creditable service up to the date of the statement and the applicable CSRS or CSRS-Offset retirement formulas displayed in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157), replacing Retirement High-3 with Disability High-3. This amount is limited to a maximum of [(Disability High-3 x 80%)/12]. • Step 5. Compare Steps 3 and 4 and select the larger of the amounts. CSRS and CSRS-Offset LEO/FF (Retirement Codes **6**, **3**, and **T**). If the employee's past creditable service is less than 5 years, then no monthly disability pension is allowed. For employees with 5 or more years of creditable service, the monthly disability is computed as follows: If the employee is not at least 50 years of age with 20 or more years of special service, see steps above or CSRS and CSRS-Offset employees. If the employee is at least 50 years of age with 20 or more years of special service: • Step 1. Determine monthly pension: Compute [(Disability High-3 x 40%)/12]. • Step 2. Determine monthly pension using creditable past service and future service at age 60 and the applicable CSRS and CSRS-Offset Special formulas displayed in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157), replacing Retirement High-3 with Disability High-3. • Step 3. Compare Steps 1 and 2 and select the smaller of the amounts. • Step 4. Determine monthly pension using total creditable service up to the date of the statement and the applicable CSRS Special or CSRS-Offset Special retirement formulas displayed in ***Appendix E: Civil Service Retirement System (CSRS) and CSRS-Offset Special Retirement (Retirement Coverage Codes E, T, and 6)*** (on page 159), replacing Retirement High-3 with Disability High-3. Amount limited to maximum of [(Disability High-3 x 80%)/12]. • Step 5. Compare Steps 3 and 4 and select the larger of the amounts. FSRDS and FSRDS-Offset (Retirement Codes **3** and **G**): If the employee's past creditable service is less than 5 years, then no monthly disability is allowed. For employees with 5 or more years of creditable service, the monthly disability pension is computed as follows: If the employee is 60 or more years of age, the monthly annuity is computed as follows: • Step 1. Determine monthly pension: Compute [(Disability High-3 x creditable past service) x 2%]. • Step 2. Compute Step 1/12, subject to maximum of

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>[(Disability High-3 x 70%)/12].

If the employee is less than 60 years of age, the monthly annuity is computed as follows:
Step 1. Determine monthly pension: Compute [(Disability High-3 x 40%)/12].
Step 2. Determine monthly pension: Compute [(Disability High-3 x years of service) x 2%]. These years of service as equal to the years of past creditable service plus future service to age 65.
Step 3. Compute [Step 2/12].
Step 4. Compare Steps 1 and 3 and select the smaller of the amounts.
Step 5. Determine monthly pension (Disability High-3 x years of service x 2%). Here years of service is equal to years of creditable service as of the statement date.
Step 6. Compute [Step 5/12]. This is subject to maximum of [(Disability High-3 x 70%)/12].
Step 7. Compare Steps 4 and 6 and select the larger of the amounts.
FSPS (Retirement Code P): If the employee's past creditable service is less than 18 months, then no monthly disability pension is allowed. For employees with more than 18 months of creditable service, the monthly disability pension is computed as follows:
Step 1. Determine monthly pension: Compute [Disability High-3 x 60%/12].
Step 2. Determine monthly pension using total creditable service up to the date of the statement and FSPS retirement formulas in Appendix F: Foreign Service Pension System (FSPS) (Retirement Coverage Code P) (on page 161), replacing Retirement High-3 with Disability High-3.
Step 3. Compare Steps 1 and 2 and select the larger of the amounts.
In the above calculations, the Years of Service is not prorated for part-time employees (Work Schedules P, Q, S, and T) as is done for Retirement Annuity estimates.</td></tr>
<tr><td>Age at Old Age Benefits</td><td>Displays the age at which Social Security disability benefits would be replaced by old age benefits. This is determined according to the following table. This field appears on the FERS, FSPS, and CSRS-Offset statements only (Retirement Code I, K, M, O, P, C, and E).</td></tr>
</table>

The table below lists the Age at Old Age Benefits.

Birth Year	Age (Years/Months)
Up to 1937	63/00

Birth Year	Age (Years/Months)
1938	65/02
1939	65/04
1940	65/06
1941	65/08
1942	65/10
1943 to 1954	66/00
1955	66/02
1956	66/04
1957	66/06
1958	66/08
1959	66/10
1960 and later	67/00

The following fields are displayed in the Benefits Under The Federal Employees Retirement System (FERS) section:

Field	Description
Additional Amount	Displays the additional amount payable for the Basic Employee Death Benefit. For deaths after December 1, 2016, this amount is **`$32,423.56`**. If the employee does not have 18 months of civilian service, **`N/A`** is displayed. This field appears on FERS and FSPS statements only (Retirement Codes **`I`**, **`K`**, **`M`**, **`O`**, and **`P`**).

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Spouse's Estimated Monthly Survivor Annuity</td><td>
Displays the estimated monthly annuity that the employee's eligible spouse may receive under survivor's income. This amount only applies to employees with 18 months or more of creditable service as of the statement date.
FERS, FSPS, and FERS LEO/FF (Retirement Codes I, K, M, O, and P): The monthly survivor annuity is computed as follows:

Step 1. Compare Annual Pay and Disability High-3 and select the larger of the amounts.
Step 2. Compute monthly survivor annuity as [(Step 1 amount x 50%) + the Additional Amount for 2019 ($32,423.56)].

CSRS and CSRS-Offset (Retirement Codes 1, C, and R): The monthly survivor annuity is computed as follows:

Step 1. Determine Monthly Disability Pension.
Step 2. Determine monthly survivor annuity using total creditable service up to the date of the statement and applicable CSRS or CSRS-Offset retirement formulas in Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R) (on page 157), replacing Retirement High-3 with Disability High-3.
Step 3. Compare Steps 1 and 2 and select the larger of the amounts.
Step 4. Compute monthly survivor annuity: [Step 3 amount x 55%].

CSRS and CSRS-Offset LEO/FF (Retirement Codes 6, E, and T): The monthly survivor annuity is computed as follows:
If the employee is not at least 50 years of age with 20 or more years of special service, see steps above for CSRS and CSRS-Offset employees.
If the employee is at least 50 years of age with 20 or more years of special service,

Step 1. Determine Monthly Disability Pension.
Step 2. Determine monthly survivor annuity using total creditable service up to the date of the statement and applicable CSRS Special or CSRS-Offset Special retirement formulas displayed in Appendix E: Civil Service Retirement System (CSRS) and CSRS-Offset Special Retirement (Retirement Coverage Codes E, T, and 6) (on page 159) replacing Retirement High-3 with Disability High-3.
Step 3. Compare Steps 1 and 2 and select the larger of the amounts.
Step 4. Compute monthly survivor annuity as [Step 3 amount x 55%].

In the above calculations, the Years of Service is not prorated for part-time employees (Work Schedules P, Q, S, and T).
</td></tr>
</table>

The following fields are displayed in the Social Security Benefits/Medicare Benefits section:

Field	Description
Current Year Bi-Weekly Employee Social Security (OASDI) Deductions	Displays the employee's current year biweekly Social Security benefits. This amount is obtained from PAYE as of PP 01 of the current year. This field appears on FERS, FERS LEO/FF, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M,O**, **P**, **C**, and **E**). Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly Employee Medicare (HIT) Deductions	Displays the employee's current year biweekly deductions for Medicare benefits. This amount is obtained from PAYE as of PP 01 of the current year. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Employee Social Security and Medicare Deductions	Displays the total current year cost of the employee's Social Security and Medicare benefits. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, **C**, and **E**). Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Agency Social Security (OASDI) Costs	Displays the Agency's current year biweekly cost for the employee's Social Security benefits. This amount is obtained from PAYE as of PP 01 of the current year. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, **C**, and **E**). Manual payments and adjustments are not included in this amount.
Current Year Bi-Weekly Agency Medicare (HIT) Costs	Displays the Agency's current year biweekly cost for the employee's Medicare benefits. This amount is obtained from PAYE as of PP 01 from the current year. Manual payments and adjustments are not included in this amount.
Total Current Year Bi-Weekly Agency Social Security and Medicare Costs	Displays the total current year biweekly cost to the Agency for the employee's Social Security and Medicare benefits. This amount is the sum of the biweekly cost to the employee and Agency. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, **C**, and **E**). Manual payments and adjustments are not included in this amount.
Prior Year Annual Employee Deductions for Social Security (OASDI)	Displays the employee's prior calendar year cost for Social Security benefits. This amount is obtained from PAYE as of the last pay period of the prior year. Because this is on a calendar year basis, not tax year, the amount may exceed the limit for some employees. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, **C**, and **E**). In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual Employee Deductions for Medicare (HIT)	Displays the employee's prior year cost for Medicare benefits. This amount is generated from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating

Field	Description
	Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details.
Total Prior Year Employee Deductions for Social Security and Medicare	Displays the employee's prior calendar year cost for Social Security and Medicare benefits. This amount is the sum of the employee and Agency costs. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, **C**, and **E**). In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual Cost to Agency for Social Security (OASDI)	Displays the Agency prior calendar year cost for the employee's Social Security benefits. This amount is generated from PAYE as of the last pay period of the prior year. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, **C**, and **E**). In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Prior Year Annual Cost to Agency for Medicare (HIT)	Displays the Agency's prior calendar year cost for the employee's Medicare benefits. This amount is generated from PAYE as of the last pay period of the prior year. In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Total Prior Year Cost to Agency for Social Security and Medicare	Displays the total prior calendar year cost of the employee's Social Security and Medicare benefits. This amount is the sum of the employee and Agency costs. This field appears on FERS, FSPS, and CSRS-Offset statements only (Retirement Codes **I**, **K**, **M**, **O**, **P**, and **E**). In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.
Total Current Year Bi-weekly Cost for HIT/Medicare	Displays the total current year biweekly cost of the employee's HIT/Medicare benefits. This amount is the sum of the employee and Agency costs. This field appears on CSRS, CSRS LEO/FF, and FSRDS statements only (Retirement Codes **1**, **3**, **6**, and **R**). Manual payments and adjustments are not included in this amount.

Field	Description
Total Prior Year Cost for HIT/Medicare	Displays the total prior calendar year cost of the employee's HIT/Medicare benefits. This amount is the sum of employee and Agency costs. This field appears on CSRS, CSRS LEO/FF, and FSRDS statements only (Retirement Codes **1**, **3**, **6**, and **R**). In cases where this amount is negative, usually due to adjustments, this field will contain asterisks (********) and a footnote will display stating *Due to adjustments, this amount could not be computed. Contact the appropriate office or individual as designated by your employing organization for details*.

The following fields are displayed in the If You Leave The Federal Government Before You Retire section:

Field	Description
Annual Leave Balance, Prior Year	Displays the employee's Annual Leave Current Balance hours displayed on IRIS Program IR136 as of the last pay period of the prior year. For U.S. Attorneys employees with special employment program code **P**, this field displays the U.S. Attorneys Leave Frozen Annual Balance as displayed on IRIS Program IR136 as of the last pay period of the prior year.
Value of Annual Leave Balance, Prior Year	Displays the employee's Annual Leave Current Balance as displayed on IRIS Program IR136 as of the last pay period of the prior year. This field is computed as Annual Leave Current Balance multiplied by the employee's hourly rate of pay. For full-time employees, the hourly rate is determined by dividing the Adjusted-Salary by 2087. For part-time employees, the hourly rate is determined by dividing the full-time equivalent annual salary by 2087. The annual salary is not used in this case because it has already been prorated for a part-time tour-of-duty. For U.S. Customs employees covered by COPRA, this field is computed by dividing the adjusted salary as of PP 01 of the current year by 2087 (allowable overtime is not included). For U.S. Attorneys employees with special employee program code **PZ**, this field shows the dollar value of the employee's US Attorney Leave Frozen Annual Balance as displayed on IRIS Program IR136 as of the last pay period of the prior year. The hourly rate used in computing the dollar value is US Attorney Leave Frozen Leave Rate as displayed on IRIS Program IR136.

The following fields are displayed in the Other Benefits section:

Field	Description
Long Term Care Insurance Payroll Deduction	Indicates whether or not an employee is participating in Long Term Care (LTC) Insurance. This field is displayed on IRIS Program IR116. If the plan code is **LE**, then the assumption is the employee is participating in LTC Insurance. If the employee is not participating in LTC Insurance, **No** is displayed.

Field	Description
Dental Plan Code	Displays the employee's dental plan enrollment code as it appears on IRIS Program, IR115.
Vision Plan Code	Displays the employee's vision plan enrollment code as it appears on IRIS Program IR115.
Flexible Spending - Healthcare	Displays the employee's flexible spending plan code for healthcare as it appears on IRIS Program IR113, Flexfund.
Flexible Spending - Dependent Care	Displays the employee's flexible spending plan code for dependent care as it appears on IRIS Program, IR113.
Current Year Bi-Weekly Cost for Dental	Displays the biweekly amount paid by the employee for dental coverage as it appears on IRIS Program, IR115.
Current Year Bi-Weekly Cost for Vision	Displays the biweekly amount paid by the employee for vision coverage as it appears on IRIS Program, IR115.
Current Year Bi-Weekly Cost for Flexible Spending - Healthcare	Displays the biweekly amount paid by the employee for flexible spending - healthcare as it appears on IRIS Program, IR113.
Current Year Bi-Weekly Cost for Flexible Spending - Dependent Care	Displays the biweekly amount paid by the employee for flexible spending - dependent care as it appears on IRIS Program, IR113.

Note: On FDIC statements only, the fields Life Insurance Coverage Amount, Life Insurance Option 1 Factor, Life Insurance Option 2 Factor, and Life Insurance Option 3 Factor correspond to Life Insurance Plan Code 10 (FDIC Life Insurance) and Life Insurance Benefit Type 2 (Non-Federal). This can be seen on PINQ Program PQ054, PACS Life Insurance, and IRIS Program IR116, depending on whether the employee is enrolled in Federal and/or non-Federal insurance.

The following fields are displayed on FDIC statements:

Field	Description
FDIC Basic Life Insurance	Displays the amount payable under FDIC non-Federal Basic life insurance. This is computed as the employee's life insurance coverage amount multiplied by 1,000. This amount is subject to an $800,000 limit for **EM** pay plan employees and $300,000 limit for all others.
FDIC Optional Employee Life Plan Option 1 - Employee	Displays the amount payable under FDIC life insurance Option 1. This is computed as the employee's life insurance Option 1 Factor multiplied by the employee's adjusted basic salary rounded 1,000. If the employee has

Field	Description
	not elected Option 1, **N/A** is displayed. This amount is subject to a $1,000,000 limit.
FDIC Group Life Insurance - AD&D	Displays the amount payable under FDIC Group life insurance for accidental death and dismemberment. This is computed as the employee's Life Insurance Coverage Amount multiplied by 1,000.
FDIC Life Insurance Coverage Amount	Displays the basic life insurance amount payable after retirement up to age 65 at death from any cause. The amount is equal to the Life Insurance Coverage Amount multiplied by 1,000. This amount is subject to a $300,000 limit.
FDIC Life Insurance - Spouse and Family Optional Coverage	Displays the amount payable for the death of the employee's spouse. Using the employee's Life Insurance Option 2 Factor and Life Insurance Option 3 Factor, this is determined according to the following table:

The table below is used to compute the FDIC Life Insurance - Spouse and Family Optional Coverage amount payable for the death of the employee's spouse.

Life Insurance Option 2 Factor	Life Insurance Option 3 Factor	Amount Payable
blank or zero	blank or zero	N/A
blank or zero	2000	$10,000
0500	blank or zero	(Life Insurance Coverage Amount x 1000) /2
0500	greater than zero	$10,000 + [(Life Insurance Coverage Amount x 1000)/2]
1000	blank or zero	(Life Insurance Coverage Amount x 1000) (up to $300,000)
1000	greater than zero	$10,000 + (Life Insurance Coverage Amount x 1000) (up to $300,000)

The following fields are displayed in the Other Benefits section on FDIC statements:

Field	Description
FDIC Life Insurance - Spouse and Family Optional Coverage	Displays the amount payable under FDIC Spouse and Family Optional life insurance for the death of the employee's child. This amount is determined according to the following table, using the employee's Life Insurance Option 3 Factor.

The table below is used to compute the FDIC Life Insurance - Spouse and Family Optional Coverage amount payable for the death of the employee's child.

Life Insurance Option 3 Factor	Amount Payable
2000	$10,000
all others	N/A

90-Day Notification for Recertification of Retention Allowance

Report Number	AECO37U
Brief Description	Provides a list of employees approaching expiration of retention allowance. It is prepared 90 days in advance of the expiration date. This report contains sensitive data and its use is restricted. This report is produced each pay period and is available as a hard copy or by electronic transmission. It is distributed by POI. This report is also available through RFQS, 90-Day Notification for Recertification for Retention Allowance.

PREPARED XX/XX/XX AECO37U9 90–DAY NOTIFICATION FOR RECERTIFICATION OF RETENTION ALLOWANCE – PROJECTED AS OF XX/XX/XX PAGE 1

TR 93 INTERNAL REVENUE SERVICE PERS. OFF. ID. 2672 ANDOVER, MA

EMPLOYEE NAME / SOC SEC NO	ORG. STRUCTURE 2	3	4	PAY PLAN	GRADE /STEP	BASE SALARY	ALLOWANCE EFF DATE	ALLOWANCE PERCENT	ALLOWANCE AMOUNT	SALARY TOTAL WITH ALLOWANCE
DOE, JANE	74	30	0000	GS	03/02	18,499.00	XXXXXX	20	4,000 00	22,499.00

EMPLOYEES LISTED ARE CURRENTLY RECEIVING A RETENTION ALLOWANCE. AS RE-QUIRED, EACH ORIGINAL DETERMINATION MUST BE REVIEWED ANNUALLY FOR RECONSID-ERATION.

REFER TO INTERNAL RETENTION ALLOWANCE PLAN FOR ADDITIONAL GUIDANCE AND PROCESSING PROCEDURES.

Figure 93: 90-Day Notification for Recertification of Retention Allowance

Appendix A: High-3 Average Pay Computations

Example 1 - High-3 Average Pay Computation

The employee's proposed date of retirement is 5/3/2013. Find rates of basic pay in effect for the pay period 5/3/2010 to 5/3/2013. The employee's pay history is shown below.

Date of Change in Pay	Annual Pay
08/05/2012	$29,400.00
12/017/2011	$28,001.00
04/06/2011	$27,653.00
06/03/2011	$25,003.00
01/03/2010	$23,890.00

For each change in the employee's pay rate, determine the time interval that was in effect, the time factor for the interval, the annual pay in effect for the interval, and the pay earned during the interval.

1. The first interval begins on 5/3/2013, the proposed retirement date, and ends on 8/5/2012, the effective date of the first change in annual pay. The number of days in this interval is determined by subtracting the interval begin date from the interval end date. The result is 269 days.

   5/3/2013 - 8/5/2012 = 8 months, 29 days

   (8 x 30) + 29 = 269 days

2. The time factor for this interval is computed as Number of Days Interval / 360, PSBS assumes that a month is 30 days, so a year is equal to 360 days (30 x 12 = 360). So, for the first interval the time factor is 269 / 360. The result is 0.747222.

3. The annual pay in effect for this time interval is $29,400.00.

4. The pay earned for the time interval is computed as Time Factor x Annual Pay. So, for the first interval, the pay earned is 0.747222 x $29,400.00. The result is $21,968.33 estimated earnings this interval.

   Repeat steps 1 through 4 for each of the intervals in the 3-year period. See the completed chart below.

End Date of Pay Change or Retire Date	Begin Date of Pay Change or Retire Date	Number of Days in Interval	Time Factor (Number of Days in Interval / 360)	Annual Salary in Effect	Pay Earned (Time Factor x Basic Pay)
05/03/2013	08/05/2012	269	.747222	$29,400.00	$21,968.33
08/04/2012	12/04/2011	238	.66111	$28,001.00	$18,511.77
12/06/2011	04/06/2011	241	.669444	$27,653.00	$18,512.13
04/05/2011	06/03/2010	303	.841667	$25,003.00	$21,044.20
06/025/2010	05/04/2010	29	.080556	$23,890.00	$1,924.48

5. Determine the total estimated pay earned in the 3-year period. The result is $81,960.91.

6. Divide the total estimated pay earned by 3. If the employee does not have 3 years of salary data, use the actual length of service (total of time factors) to compute the high-3 average pay.

   $81,960.91 / 3 = $27,320 Estimated High-3 Average Pay

Example 2 - High-3 Average Pay Computation for U.S. Custom Officers covered by COPRA and Retirement Coverage Code 1

For the purposes of this statement, retirement benefits payable within the next 3 years have been estimated using a high-3 consisting of earnings including allowable overtime where possible. To estimate an eligible retirement date, PSBS assumes the tax year is 01/01 to 12/31 in this instance. By multiplying the total retirement deductions for a year by a factor of 1 divided by the retirement deduction rate (Factor Rate), the earning figure which yielded the deductions can be determined. This estimated earnings figure is used to determine an estimate of the employee's high-3.

The employee's proposed date of retirement is 10/15/2013. Find retirement deductions and rates of basic pay in effect for the 3 years ending on 10/15/2013. The employee's pay history is shown below.

Date of Change	Annual Salary	Tax Year	Total Retirement Deductions	Retirement Deduction Rate	Factor Rate	Estimated Salary Plus Overtime
01/02/2013	$40,733.00	2012	$3,744.33	.0700	14.29	$53,935.18
01/03/2012	$39,343.00	2011	$3,734.02	.0700	14.29	$53,359.15
		2010	$3,397.16	.0400	14.29	$48,545.42

For each period of retirement deductions or change in pay, determine the number of days in the interval, the time factor for the interval, the estimated salary plus overtime for the year covering the interval, and the earnings accumulated during the interval.

1. Because the 3-year window starts on 10/15/2010, the first interval begins on 10/15/2010 and ends on 12/31/2010. The number of days in this interval is determined by subtracting the begin date from the end date. The result is 75 days.

   12/31/2010 - 10/15/2010 = 75 days

2. The time factor for the first interval is computed as Number of Days in Interval divided by 360. PSBS assumes that a month is 30 days and a year is 12 months, so one year is equal to 360 days (30 x 12 = 360). So, for the first interval,the time factor is 75 / 360. The result is 0.208333.

3. The estimated salary plus overtime for 2010 is $48,545.42. This amount is found in the Employee History Table above. If tax year retirement deductions are not available for a time interval, use the employee's estimated salary for the interval. For example, on line 4 of the Time Factor Calculations Table below, the interval is 01/01/2013 to 10/15/2013. The salary in effect on this date is $52,395.18.

4. The estimated salary plus overtime earned in the first interval is computed as Salary x Time Factor. So, for the first interval, the amount earned is 0.208333 x $48,545.42. The result is $10,113.61 estimated earnings in this interval.

   Repeat steps 1 through 4 for each of the time intervals in the 3-year period. See the completed chart below.

Line Number	Salary Interval Begin Date	Salary Interval End Date	Number of Days in Interval	Time Factor	Estimated Salary Plus Overtime	Amount Earned This Interval
1	10/15/2010	12/31/2010	75	0.208333	$48,545.42	$10,113.61
2	01/01/2011	12/31/2011	360	1.000000	$53,359.15	$53,359.15
3	01/01/2012	12/31/2012	360	1.000000	$53,935.15	$53,935.15
4	01/01/2013	10/15/2013	285	0.791667	$53,935.18	$42,698.70
Totals				3.000000		$160,106.64

5. The total estimated salary, including allowable overtime, earned during the 3-year interval is estimated at $160,106.64. Divide this figure by 3 to determine the employee's high-3 figure. If the employee does not have 3 years of salary data, use the actual length of service (total of time factors) to compute High-3 average pay.

   $160,106.64 / 3 = $53,369 Estimated High-3 Average Pay

Example 3 - High-3 Average Pay Computation for U.S. Customs covered by COPRA and Retirement Coverage Code K or C

For the purposes of this statement, retirement benefits payable within the next 3 years have been estimated using a high-3 consisting of earnings including allowable overtime where possible. To estimate an eligible retirement date, PSBS assumes the tax year is 01/01 to 12/31 in this instance. By multiplying the total retirement deductions for a year by a factor of 1 divided by the retirement deduction rate (Factor Rate), the earnings figure which yielded the deductions can be determined. The estimated earnings figure is used to determine an estimate of the employee's high-3.

The employee's proposed date of retirement is 3/18/2013. Find retirement deductions and rates of basic pay in effect for the 3 years ending on 3/18/2013. The employee's pay history is shown below.

Date of Change	Annual Salary	Tax Year	Total Retirement Deductions	Retirement Deduction Rate	Factor Rate	Estimated Salary Plus Overtime
08/28/2011	$95,232.00	2012	$949.87	.008	125.0	$118,733.75
08/29/2010	$92,346.00	2011	$910.67	.008	125.0	$113,833.75
01/03/2010	$87,365.00	2010	$886.25	.008	125.0	$110,781.25

For each period of retirement deductions or change in pay, determine the number of days in the interval, the time factor for the interval, the estimated salary plus overtime for the year covering the interval, and the earnings accumulated during the interval.

1. Because the 3-year window starts on 3/18/2010, the first interval begins on 3/18/2010 and ends on 12/31/2010. The number of days in this interval is determined by subtracting the begin date from the end date. The result is 282 days.

   12/31/2010 - 03/18/2010 = 282 days

2. The time factor for the first interval is computed as Number of Days in Interval divided by 360. PSBS assumes that a month is 30 days and a year is 12 months, so one year is equal to 360 days (30 x 12 = 360). So, for the first interval, the time factor is 282 / 360. The result is 0.0783333.

3. The estimated salary plus overtime for 2010 is $110,781.25. This amount is found in the Employee History Table above. If tax year retirement deductions are not available for a time interval, use the employee's estimated salary for the interval. For example, on line 4 of the Time Factor Calculations Table below, the interval is 01/01/2013 to 03/18/2013. The salary in effect on this date is $118,733.75.

4. The estimated salary plus overtime earned in the first interval is computed as Salary x Time Factor. So, for the first interval, the amount earned is 0.783333 x $110,781.25. The result is $86,778.81 estimated earnings this interval.

   Repeat steps 1 through 4 for each of the time intervals in the 3-year period. See the completed chart below.

Line Number	Salary Interval Begin Date	Salary Interval End Date	Number of Days in Interval	Time Factor	Estimated Salary Plus Overtime	Amount Earned This Interval
1	03/18/2010	12/31/2010	282	0.783333	$110.781.25	$86,778.61
2	01/10/2011	12/31/2011	360	1.000000	$113,833.75	$113,833.75
3	01/01/2012	12/31/2012	360	1.000000	$118,733.75	$118,733.75
4	01/01/2013	03/18/2013	78	0.216667	$118,733.75	$25,725.69
Totals				3.000000		$345,071.80

5. The total estimated salary, including allowable overtime, earned during the 3-year interval is estimated at $345,071.80. Divide this figure by 3 to determine the employee's high-3 figure. If the employee does not have 3 years of salary data, use the actual length of service (total of time factors) to compute High-3 average pay.

   $345,071.80 / 3 = $115,024 Estimated High-3 Average Pay

Example 4 - High-3 Average Pay Computation for U.S. Customs Officers covered by COPRA and Retirement Coverage Code O or Q

For the purposes of this statement, retirement benefits payable within the next 3 years have been estimated using a high-3 consisting of earnings including allowable overtime where possible. To estimate an eligible retirement date, PSBS assumes the tax year is 01/01 to 12/31 in this instance. By multiplying the total retirement deductions for a year by a factor of 1 divided by the retirement deduction rate (Factor Rate), the earnings figure which yielded the deductions can be determined. The estimated earnings figure is used to determine an estimate of the employee's high-3.

The employee's proposed date of retirement is 4/18/2013. Find retirement deductions and rates of basic pay in effect for the 3 years ending on 4/18/2013. The employee's pay history is shown below.

Date of Change	Annual Salary	Tax Year	Total Retirement Deductions	Retirement Deduction Rate	Factor Rate	Estimated Salary Plus Overtime
08/26/2012	$87,929.00	2012	$1,497.12	.013	76.92	$115,158.47

08/26/2010	$85,343.00	2011	$1,457.22	.013	76.92	$112,089.36
01/03/2010	$79,831.00	2010	$1,373.43	.013	76.92	$105,644.24

For each period of retirement deductions or change in pay, determine the number of days in the interval, the time factor for the interval, the estimated salary plus overtime for the year covering the interval, and the earnings accumulated during the interval.

1. Because the 3-year window starts on 4/28/2010, the first interval begins on 4/28/2010 and ends on 12/31/2010. The number of days in this interval is determined by subtracting the begin date from the end date. The result is 242 days.

   12/31/2010 - 04/28/2010 = 242 days

2. The time factor for the first interval is computed as Number of Days in Interval divided by 360. PSBS assumes that a month is 30 days and a year is 12 months, so one year is equal to 360 days (30 x 12 = 360). So, for the first interval, the time factor is 242 / 360. The results is 0.672222.

3. The estimated salary plus overtime for 2010 is $105,664.24. This amount is found in the Employee History Table above. If tax year retirement deductions are not available for a time interval, use the employee's estimated salary for the interval. For example, on line 4 of the Time Factor Calculations Table below, the interval is 01/01/2013 to 04/28/2013. The salary in effect on this date is $115,158.47.

4. The estimated salary plus overtime earned in the first interval is computed as Salary x Time Factor. So, for the first interval, the amount earned is 0.672222 x $105,622.24. The result is $71,016.38 estimated earnings this interval.

   Repeat steps 1 through 4 for each of the time intervals in the 3-year period. See the completed chart below.

Line Number	Salary Interval Begin Date	Salary Interval End Date	Number of Days in Interval	Time Factor	Estimated Salary Plus Overtime	Amount Earned This Interval
1	04/28/2010	12/31/2010	242	0.672222	$105.644.24	$71,016.38
2	01/10/2011	12/31/2011	360	1.000000	$112,089.36	$112,089.36
3	01/01/2012	12/31/2012	360	1.000000	$115,158.47	$115,158.47
4	01/01/2013	04/28/2013	118	0.327777	$115,158.47	$37,746.30
Totals				3.000000		$336,010.51

5. The total estimated salary, including allowable overtime, earned during the 3-year interval is estimated at $336,010.51. Divide this figure by 3 to determine the employee's high-3 figure. If the employee does not have 3 years of salary data, use the actual length of service (total of time factors) to compute High-3 average pay.

   $336,010.51 / 3 = $112,004 Estimated High-3 Average Pay

Appendix B: Regular Federal Employees Retirement System (FERS) (Retirement Coverage Code K)

Unreduced retirement benefits are available at the following age and service combinations:

- At least age 62 with 5 or more years of service
- At least age 60 with 20 or more years of service
- At least the Minimum Retirement Age (MRA) with 10 or more years of service
- At least the MRA with 30 or more years of service

If you retire at the MRA with at least 10, but less than 30 years of service, you will be reduced by 5 percent a year for each year you are under 62, unless your years of service and your benefit starts when you reach age 60 or later.

Minimum Retirement Age Chart

Year of Birth	Minimum Retirement Age
before 1948	55
1948	55 & 2 months
1949	55 & 4 months
1950	55 & 6 months
1951	55 & 8 months
1952	55 & 10 months
1953 - 1964	56
1965	56 & 2 months
1966	56 & 4 months
1967	56 & 6 months
1968	56 & 8 months
1969	56 & 10 months
1970 & after	57

See Frozen-CSRS-Service on IRIS Program IR117 for length of frozen service. (Frozen service is the total number of years and months of civilian and military service that is creditable in a CSRS component of a FERS employee. The employee must have completed 5 years of creditable civilian service before becoming subject to CSRS offset or before election date of FERS coverage.)

Retirement Formulas Used:

If the employee has not transferred from CSRS to FERS or has transferred and had no frozen service, use one of the following formulas:

If the employee is less than 62 years old or has less than 20 years of service:

1. Compute [Retirement High-3 x 1% x years of service].
2. Compute [Step 1 / 12].

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the tour of duty proration is not available.

3. Compute [Step 2 x (PP 01 tour-of-duty hours / 80)].

If the employee is age 62 or older with at least 20 years of service:

1. Compute (Retirement High-3 x 1.1% x years of service].
2. Compute [Step 1 / 12].

   For part-time employees (Work Schedules **P**, **Q**, **S**, AND **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the tour of duty proration is not available.

3. Compute [Step 2 x (PP 01 tour-of-duty hours / 80)].

If the employee has transferred from CSRS to FERS and has frozen service:

1. Follow CSRS retirement formulas shown in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157) using Frozen-CSRS-Service (shown on IRIS Program IR117) as the employee's years of service. Refer to ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157) for more information on CSRS retirement formulas.
2. Follow FERS retirement formulas shown above using the employee's years of service after the transfer as employee's years of service.
3. Add Step 1 and Step 2 amounts.

For part-time employees (Work Schedules **`P`**, **`Q`**, **`S`**, and **`T`**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the tour of duty proration is not available.

4. Compute [Step 3 x (PP 01 Tour-of-Duty Hours / 80)].

Appendix C: Federal Employees Retirement System (FERS) - Special Retirement (Retirement Coverage Code M)

Under the special retirement provisions for law enforcement officers and firefighters, retirement may begin at age 50 with 20 years of 6C-Retirement coverage or any any age with 25 years of special 6C-Retirement coverage. Once a firefighter has 20 years of special 6C-Retirement coverage, the employee is subject to mandatory retirement at age 55. Law Enforcement Officers with 20 years of special 6C-Retirement coverage are subject to mandatory retirement at age 57.

See Frozen-CSRS-Service on IRIS Program IR117 for length of frozen service. Frozen Service is the total number of years and months of civilian and military service that is creditable in a CSRS component of a FERS employee. The employee must have completed 5 years of creditable civilian service before becoming subject to CSRS offset or before the election date of FERS coverage.

Retirement Formulas Used:

If the employee has not transferred from CSRS to FERS or has transferred and has no frozen service:

1. Compute [1.7% x first 20 years of Special Service].
2. Compute [1% x Remaining Years of Service].
3. Compute [Step 1 + Step 2].
4. Compute [Retirement High-3 x Step 3].
5. Compute [Step 4 / 12].

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**, the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.
6. Compute [Step 5 x (PP 01 Tour-of-Duty Hours / 80)].

If the employee has transferred from CSRS to FERS and has frozen service:

1. Follow CSRS (or CSRS-Offset) Special retirement formulas shown in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157) using Frozen - CSRS-Service as the employee's years of service. Refer to ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157) for more information on CSRS retirement formulas.

2. Follow FERS-Special retirement formula shown above using the employee's years of service after the transfer as the employee's years of service.

3. Compute [Step 1 + Step 2].

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.

4. Compute [Step 3 x (PP 01 Tour-of-Duty Hours / 80)].

Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)

Unreduced retirement benefits are available at the following age and service combinations:

- At least age 55 with 30 or more years of service.
- At least age 60 with 20 or more years of service.
- At least age 62 with 5 or more years of service.

Retirement Formulas Used:

If the Retirement High-3 is less than $5,000:

1. Compute [(Retirement High-3 x 1%) + $25].
2. Compute [Step 1 x Years of Service].
3. Compute [Step 2 / 12] (subject to a maximum of [(Retirement High-3 x 80%) / 12]).

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the tour-of-duty proration is not available.

4. Compute [Step 3 x (PP 01 Tour-of-Duty Hours / 80)].

If the Retirement High-3 is $5,000 or more:

1. Compute [1.50% x First 5 Years of Service].
2. Compute [1.75% x Second 5 Years of Service].
3. Compute [2% x Remaining Years of Service].
4. Compute [Step 1 + Step 2 + Step 3].
5. Compute [Retirement High-3 x Step 4].
6. Compute [Step 5 x 12] (subject to a maximum of [(Retirement High-3 x 80%) x 12]).

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.

7. Compute [Step 6 x (PP 01 Tour-of-Duty Hours / 80)].

Appendix E: Civil Service Retirement System (CSRS) and CSRS-Offset Special Retirement (Retirement Coverage Codes E, T, and 6)

Under the special retirement provisions for LEO/FF, retirement may begin at age 50 with 20 years of special 6C Retirement service. Once a FF has 20 years of 6C retirement service, the employee is subject to mandatory retirement at age 55. LEOs with 20 or more years of 6C retirement service are subject to mandatory retirement at age 57.

Retirement Formulas Used:

1. Compute [2.50% x First 20 Years of Special Service].
2. Compute [2% x Remaining Years of Service].
3. Compute [Step 1 + Step 2].
4. Compute [Retirement High-3 x Step 3].
5. Compute [Step 4 x 12] (subject to a maximum of [(Retirement High-3 x 80%) x 12]).

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.

6. Compute [Step 5 x (PP 01 Tour-of-Duty Hours / 80)].

Appendix F: Foreign Service Pension System (FSPS) (Retirement Coverage Code P)

Unreduced retirement benefits are available at the following age and service combinations:

- At least age 50 with 20 or more years of service.
- At least age 60 with 5 or more years of service.

See Frozen-CSRS-Service on IRIS Program IR114 for length of frozen service. Frozen service is the total number of years and months of civilian and military service that is creditable in a CSRS component of a FERS employee. The employee must have completed 5 years of creditable civilian service before becoming subject to CSRS offset or before the election date of FERS coverage.

Retirement Formulas Used:

If the employee has transferred from FERS to FSPS:

1. Compute Years of Service as [Years of FERS Service + Years of FSPS Service].
2. Compute [1.7% x First 20 Years of Service].
3. Compute [1% x Remaining Years of Service].
4. Compute [Step 2 + Step 3].
5. Compute [Retirement High-3 x Step 4].
6. Compute [Step 5 x 12].

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the tour-of-duty proration is not available.

7. Compute [Step 6 x (PP 01 Tour-of-Duty Hours / 80)].

If the employee has transferred from FSRDS to FSPS and has less than 5 years of FSRDS service:

Use steps shown above as if the employee transferred from FERS to FSPS.

If the employee has transferred from FSRDS to FSPS and has more than 5 years of FSRDS service:

1. Compute [Total Years of Service - Frozen-CSRS-Service].

2. Compute 2% x Frozen-CSRS-Service - Subject to a maximum of [(Retirement High-3 x 70%) x 12].
3. Compute [Retirement High-3 x Step 2].
4. Compute [Step 3 / 12].
5. Compute [1.7% x First 20 Years of Step 1].
6. If Frozen-CSRS-Service > 20, Compute [1% x (Frozen-CSRS-Service - 20)].
7. Compute [Step 5 + Step 6].
8. Compute [Retirement High-3 x Step 7].
9. Compute [Step 8 / 12].
10. Compute [Step 4 + Step 9].

    For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.

11. Compute [Step 10 x (PP 01 Tour-of-Duty Hours / 80)].

If the employee has transferred from CSRS to FERS to FSPS:

1. Follow CSRS retirement formulas shown in ***Appendix D: Civil Service Retirement System (CSRS) and CSRS-Offset Retirement (Retirement Coverage Codes 1, C, and R)*** (on page 157) using Frozen-CSRS-Service as the employee's years of service.
2. Compute [Total Years of Service - Frozen-CSRS-Service].
3. Follow FERS to FSPS retirement formula shown above using Step 2 as the employee's Years of Service.
4. Compute [Step 1 + Step 3].

    For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.

5. Compute [Step 4 x (PP 01 x Tour-of-Duty Hours / 80)].

Appendix G: Foreign Service Retirement and Disability System (FSRDS) and FSRDS-Offset Retirement (Retirement Coverage Codes 3 and G)

Unreduced retirement benefits are available at the following age and service combinations:

- At least age 50 with 20 or more years of service.
- At least age 60 with 5 or more years of service.

Retirement Formulas Used:

1. Compute [Retirement High-3 x 2% x Years of Service].
2. Compute Step 1 / 12. Subject to a maximum of [(Retirement High-3 x 70%) x 12].

   For part-time employees (Work Schedules **P**, **Q**, **S**, and **T**), the monthly annuity is then prorated by the employee's PP 01 tour of duty. This is done because the full tour-of-duty proration is not available.

3. Compute [Step 2 x (PP 01 Tour-of-Duty Hours / 80)].

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